☐ Classified   ☐ Confidential   ☐ Administrative

☐ Temp Special Projects Administrator (see AP 7135)   ☐ Out-of-Class Assignment

A

Position: _____   FTE (%): _____

Division: _____   Department: _____

Term (month/year): _____   Salary Schedule (Range): _____

Work Schedule (Days, Hours): _____

B

Previously Budgeted Position - Vacant (Incumbent Separated/Separating)

Incumbent name: _____   Last date of employment: _____

Reason for vacancy: _____

Newly or Previously Budgeted Position - Never Filled

Fiscal Year Budget Approved: _____ Budget Source (e.g., NRA, Grant Name): _____

Out-of-Class Assignment Reason ☐Incumbent on Leave ☐ Vacancy ☐Back-Fill

C

Rationale/Operational need for and consequence of not, filling this position (attached additional page if needed):

Area Vice President Initials: _____

D

Budget information to fund this position:

Account Number: _____   Amount: _____% $_____

Account Number: _____   Amount: _____% $_____

Fund (check all that apply):   General Fund Unrestricted   Restricted Funds   Categorical   Grant   Temporary

Annual renewal of this position is contingent upon the College's receipt of continued funding.

Duration (grant/temporary funded):Beginning date: _____   End date: _____

Comments / Please list any changes in the budgeted position (e.g. title, FTE, Term, etc.):

Fiscal Use Only: Funding available   Funding not available | Position # _____   Contract # _____

E

Signatures - print/sign/date (to be completed in numerical order):

1. **Requesting Manager:** _____ _____ _____

2. **Division Vice President:** _____ _____ _____

3. **Applicable Human Resources Manager:** _____ _____ _____

4. **Chief Compliance/Budget Officer:** _____ _____ _____

5. **Vice President, Human Resources:** Recommend to fill   Yes   No (see attached rationale) _____ _____
                                                                                          Initial   Date

Reviewed by the President's Cabinet, the following action was taken on the above request:

☐ Approved to fill immediately ☐ Approved to fill (enter date) _____ ☐ Denied

6. **President/CEO:** _____ _____ _____

To be completed prior to beginning the Request to Fill (RTF) Process: **(See page 5 for Out-of-Class Request to Fill Process)**

1. The requesting manager follows the chain of command to consult with the division Vice President (VP) to ensure the position is appropriately classified, budgeted (including funding source), and operationally necessary. The RTF form should be completed after confirming support from the division VP (including items 1 a & b if applicable). Additional processes are required for the following situations:

   a. **Requests for a new or revised job description** – Consult with Human Resources (HR).
   The HR Analyst assigned to Classification/Reclassification will collaborate with the Associate VP, Human Resources, and the requesting manager to analyze the essential functions required for the position to determine if a new or revised job description is necessary, this includes a compensation study. HR will also advise of any collective bargaining-related obligations or other required processes.

      i. The requesting manager is responsible for ensuring their chain of command, including the division VP, knows of and approves of the new or revised job description language. The division VP may be asked to speak to the position/job description when seeking approval from President's Cabinet (PC).

      ii. **An approved job description must be attached to all RTFs**. HR is responsible for managing the job description approval workflow. HR will notify the requesting manager of the approval status. Do not submit an RTF if a position classification or job description revision is in process.

   b. **Position requests that require a new, never used** (never filled position that was budgeted before the most recent New Resource Allocation)**, or a change to the existing budget** – Consult with President's Cabinet. The Division VP will communicate the position scenario and provide backup documentation (including a budget worksheet prepared by Fiscal Services) at PC. The VP should also bring a copy of an RTF with sections A-D completed (the requesting manager should fill in as much information as possible); signatures are not required at this point. Afterward, proof of the preapproval will be indicated on the top of the RTF "Approved President's Cabinet (date)" and/or documentation that clearly states the President/CEO approved the new or revised position budget will be provided.
   Common preapproval scenarios include:

      i. New position requests that require total (i.e., New Resource Allocation or immediate/emergent need request) or partial (i.e., the existing budget will be reallocated to cover some of the cost for the new position) funding.

      ii. New position requests that will be funded entirely by reallocating funds from an existing budget.

      iii. A position with newly requested funding (i.e., New Resource Allocation or immediate/emergent need request), such as a position previously funded by a grant or temporary funds.

      iv. A budgeted position that has never been filled, excluding those funded by the most current New Resource Allocation.

   Position/budget preapproval does not equate to starting the recruitment process. The RTF must go through the full process outlined under the "Completing the Request to Fill form" section before the recruitment process can begin.

Completing the Request to Fill form (all sections require completion):

Section A – Basic Position Information:

1. All items in this section must be completed. This information is used to post the position laterally (if applicable) and on the employment website.

   a. Only the position title listed on the approved job description should be used. "Interim" or "Acting" should be added in front of the title when applicable for management positions.

    b.   Ensure the FTE listed aligns with the budgeted amount.

    c.   Confirm the salary range on the appropriate salary schedule.

    d.   Be sure to state the work schedule at the time of hire (e.g., *Mon-Thur, 8am-5pm, & Fri 8am-4:30pm*).

Section B – Previously or Never Filled Position Information (choose one of the two options):

1. Indicate if this is a "**Previously Budgeted Position - Vacant** (Incumbent Separated/Separating)".

    a.   Choose this option if the incumbent in the position has separated or will separate (e.g., retirement, resignation, etc.) from the College. HR will verify that a separation form (via SmartSheet) is on file.

2. Indicate if this is a "**Newly or Previously Budgeted Position - Never Filled**".

    a.   Choose this option if you received budget approval from the President's Office for this position and it has never been filled. State the fiscal year that approval was received. Indicate the funding source such as New Resource Allocation (e.g., *NRA 13*), Grant (e.g., Title V), etc. **Documentation confirming budget approval from the President must be attached to the RTF form.**

Section C – Position Rationale:

1. A written justification, including the operational need (list the core duties, do not reiterate the job description) and the anticipated impact on the department/division/College if the position remains unfilled, is required for all RTFs (new and currently budgeted positions). **Attach the current and/or proposed organizational chart** and additional documentation as needed.

    a.   It is important for the division VP to understand the justification. The position justification discussion should occur during the initial discussion with the VP before completing the RTF. This ensures that the division VP is fully informed about the position and can confidently explain the content/context of the RTF during PC meetings.

    b.   The division VP must initial Section C to indicate they have reviewed the written justification.

Section D – Funding Information:

1. Include the full account string/s (Fund-Organization-Account-Program-Activity Code), the FTE percentage to be charged to the corresponding account string, and the dollar amount associated with the FTE percentage for the applicable salary range.

    a.   Position amount - use the EZ Salary Projection Form on the Fiscal Services Forms and Reference Documents webpage for replacement positions. Use the budget worksheet prepared by Fiscal for new/amended positions.

2. Indicate all applicable fund types.

    a.   If Categorical, Grants, or Temporary funds are being used you must indicate if the annual renewal of this position is contingent upon the College's receipt of continued funding and the duration of the funds.

3. Use the comment section to state any anomalies with the budget used to fund the position. (E.g., *received pre-approval to use funds from a vacant Administrative I position to fund this Administrative II position. Additional funding was received on NRA 12*.)

4. "Fiscal Use Only" - completed when the form is routed to the Chief Compliance/Budget Officer for signature.

Section E - Signatures

1. **All signatures are required in the order listed.** The manager requesting to fill the position signs the **Requesting Manager** signature line. If the Division VP is also the requesting manager, the Division VP should sign both areas.

2. **Division Vice President** signature requests should be sent to the Division Executive Assistant II.

    a. Division VP reviews the request and verifies that the position meets the department/division needs. The VP then approves/denies the RTF.

    b. The Division VP's Executive Assistant will forward the signed RTF to the Manager, Recruitment and Employment and the Coordinator, Project/Program supporting Recruitment Services.

3. The **Manager, Recruitment and Employment** will work with various personnel to analyze the RTF (excluding budget/funding information), resolve discrepancies, and provide additional information to the VPHR as needed. E.g., verify separation paperwork received for "replacement" requests, analyze org chart and position requested, etc.

    a. The Manager, Recruitment and Employment, or the Coordinator, Project/Program supporting Recruitment Services, will forward the RTF to Fiscal Services (applicable Fiscal Specialists).

4. The **Chief Compliance/Budget Officer** will review account information, confirm the position and contract numbers, and determine current or future budget availability.

    a. The applicable Fiscal Specialists will verify the budget information and add the position and contract numbers before requesting the Chief Compliance/Budget Officer's signature. The applicable Fiscal Specialist will consult with the Division VP's office if the budget information is incomplete or incorrect. This may result in returning the form for correction.

    b. After obtaining the Chief Compliance/Budget Officer's signature, the Fiscal Specialists will forward the RTF to the Manager, Recruitment and Employment, and the Coordinator, Project/Program supporting Recruitment Services, who will prepare the RTFs for the Vice President, Human Resources Signature.

5. The **Vice President, Human Resources** (VPHR) will sign the RTFs after the Associate Vice President, Human Resources has reviewed them.

    a. The Manager, Recruitment and Employment, and the Coordinator, Project/Program supporting Recruitment Services work with the applicable Executive Assistants in Human Resources to obtain the necessary review and the VPHR signature.

    b. The Executive Assistants to the VPHR will contact the applicable VP's office to ensure the division VP is still interested in moving forward with the RTF. This ensures circumstances have not changed between when the division VP signed the RTF and when it will be sent to the President's office to be added to the agenda for the next scheduled PC meeting.

    c. RTFs that have completed the full process above by 4:00 p.m. on Wednesday, will be forwarded by the Executive Assistant II to the VPHR, to the Director, Office of the President and Board of Trustees. The RTF discussion will be added to the agenda for the next PC meeting (typically on Tuesday mornings).

6. The **President/CEO** will evaluate the RTF to ensure it meets the needs of the College and its institutional goals; consult with the applicable VP if needed (rationale for filling the position); determine whether the RTF is approved to fill or denied; and sign the RTF.

    a. The Director, Office of the President, and Board of Trustees will forward the signed RTFs to the Executive Assistant II to the VPHR and note the outcome in PC notes.

    b. Reasoning for denial may vary (budgetary reasons, need to modify the position, position on hold until further notice, etc.). HR will communicate the denial to the requesting manager; however, the Division VP will also have insight.

Concluding the RTF Process

1. Human Resources will notify Fiscal Services of the decision made at PC.

2. An HR Technician will be assigned to continue the recruitment process for approved RTFs. They will work with the requesting/hiring manager to ensure compliance with applicable Recruitment and Hiring Administrative Procedures.

Out-of-Class (OOC) Assignments

Out-of-class assignments may be requested to fill a position due to a vacancy, the incumbent being on leave, or back-filling for an incumbent working out of class. The requesting manager should follow the chain of command to consult with the division Vice President (VP) to ensure support for the out-of-class assignment rationale.

Section A – Basic Position Information:

1. All items in this section must be completed. This information is relative to the position to be filled.

    a. Only the position title listed on the approved job description should be used.

    b. Ensure the FTE listed aligns with the budgeted amount.

    c. Confirm the salary range on the appropriate salary schedule.

    d. Be sure to state the work schedule at the time of hire (e.g., *Mon-Thur, 8am-5pm, & Fri 8am-4:30pm*).

Section B – Out-of-Class Reasoning (check one of the three options)

1. Check "Incumbent on Leave" if the incumbent is on leave approved by Human Resources (medical or administrative).

2. Check "Vacancy" if the incumbent in the position has separated or will separate (e.g., retirement, resignation, etc.) from the College. HR will verify the separation. Complete the "Previously Budgeted Position" information. Also, check this box if you received budget approval from the President's Office for a new position, and it has never been filled. Complete the "Newly or Previously Budgeted Position" information. Documentation confirming budget approval from the President must be attached to the RTF form.

3. Check "Back-Fill" if the incumbent is currently serving in an OOC assignment.

Section C – Position Rationale:

1. A written justification, including the operational need (list the core duties, do not reiterate the job description) and the anticipated impact on the department/division/College if the position remains unfilled, is required for all RTFs. Attach the current organizational chart and additional documentation as needed.

    a. It is essential for the division VP to understand the justification. The position justification discussion should occur during the initial discussion with the VP before completing the RTF. This ensures that the division VP is fully informed about the position and can confidently explain the content/context of the RTF during PC meetings.

    b. The division VP must initial Section C to indicate they have reviewed the written justification.

Section D – Funding Information:

1. Leave this section blank.

Section E - Signatures

1. **Signatures are required in the order listed.** Out-of-Class RTFs are not forwarded to Fiscal Services. Fiscal Services will receive notification with back-up documentation/information via a Change of Status form once the OOC assignment has been confirmed. The manager requesting to fill the position signs the **Requesting Manager** signature line. If the Division VP is also the requesting manager, the Division VP should sign both areas.

2. **Division Vice President** signature requests should be sent to the Division Executive Assistant II.

    a. Division VP reviews the request and verifies that the position meets the department/division needs. The VP then approves/denies the RTF.

    b. The Division VP's Executive Assistant will forward the signed RTF to the HR Analyst assigned to HRIS processes for Unit A OOC assignments or to the Manager, Recruitment and Employment, and the Coordinator, Project/ Program supporting Recruitment Services for Unit B and Confidential OOC assignments.

3. The **applicable HR Manager** or designee will work with various personnel to verify the information on the RTF and resolve discrepancies. This includes but is not limited to verifying separation or new funding paperwork for vacancies and confirming an incumbent's leave status.

    a. Unit A OOC assignments – the **Senior Director, Labor Relations and Employee Services,** and the HR Analyst assigned to HRIS processes.

    b. Unit B and Confidential OOC assignments – **Manager, Recruitment and Employment**, and the Coordinator, Project/Program supporting Recruitment Services.

    c. The applicable manager or designee will forward the RTF to the Executive Assistant II to the VPHR to obtain the necessary review and the VPHR signature.

4. The **Vice President, Human Resources** (VPHR) will review and sign the RTF.

    a. RTFs that have completed the full OOC RTF process above by 4:00 p.m. on Wednesday will be forwarded by the Executive Assistant II to the VPHR, to the Director, Office of the President and Board of Trustees. The RTF discussion will be added to the agenda for the next PC meeting (typically on Tuesday mornings).

5. The **President/CEO** will evaluate the RTF to ensure it meets the needs of the College and its institutional goals; consult with the applicable VP if needed (rationale for filling the position); determine whether the RTF is approved to fill or denied; and sign the RTF.

    b. The Director, Office of the President, and Board of Trustees will forward the signed RTFs to the Executive Assistant II to the VPHR and note the outcome in PC notes.

    c. Reasoning for denial may vary (budgetary reasons, need to modify the position, position on hold until further notice, etc.). HR will communicate the denial to the requesting manager; however, the Division VP will also have insight.

Concluding the OOC RTF Process

1. Unit A OOC assignments – The HR Analyst assigned to HRIS processes will present the RTF and rationale to the VPHR and the Classified School Employees Association, Chapter 262 (CSEA 262) President for discussion. Upon reaching a mutual agreement, a Side Letter will be routed to the CSEA 262 President and the College President/ CEO for signature.

    a. The HR Analyst assigned to HRIS processes will provide the requesting manager with the earliest possible start date and notify them to submit a Change of Status form.

2. Unit B OOC assignments – The Manager, Recruitment and Employment, and/or the Coordinator, Project/Program supporting Recruitment Services will assign an HR Technician to begin the process outlined in Article 11.D. of the CSEA, Chapter 651 Collective Bargaining Agreement.

3. Consult with the Manager, Recruitment and Employment, or the Coordinator, Project/Program supporting Recruitment Services if you have questions regarding interim (AP 7122) management assignments or Confidential position OOC assignments.