

## UW Oshkosh Increased Personnel Action Review (IPAR) Program

Effective Date: September 11, 2017

### Introduction:

Under the guidance of the UW System 2020FWD CORE (Commitment to Operational Reform and Excellence), UW-Oshkosh is committed to use resources responsibly. We must aggressively pursue opportunities to create efficiencies and reduce costs. The single largest expenditure by the university is personnel. The university is instituting a new program, IPAR (Increased Personnel Action Review) in an effort to evaluate positions for accountability, efficiency and operational excellence. Although personnel costs will require a more thorough review by administration, it will be the expectation that units independently seek reductions in all areas including operational costs and travel expenditures.

### Scope

The IPAR program will encompass all vacancies, new positions, and academic staff rehires. In addition, there will be a review on all salary adjustments including, title/salary changes, overloads, temporary base adjustments, and matching of outside offers. This includes **all** positions, including temporary, and project appointments, regardless of funding source, with the exception of student employees, academic actions for tenure or promotion, and grant funded positions. (Funds 133 and 144).

- As positions become vacant through attrition, no positions will be refilled without going through the IPAR process. Units can request an IPAR review only after a 90-day waiting period from when the incumbent is out of pay status.
- Any request for title, classification or salary change resulting from reorganization due to not filling vacant positions requires an updated position description and organizational chart. Human Resources will review to determine appropriate title, classification and salary. A completed IPAR form is required detailing the reorganization.
- Temporary base adjustment (TBA) requests will need to be approved via the IPAR review process. Approved TBA's will be granted for a maximum period of 6 months.

### IPAR Process:

1. Procedure:
  - a. VACANCIES - All vacancies must remain unfilled for a minimum of 90 days after the incumbent is out of pay status before a IPAR review can be submitted. The intent is to hold firm to a 90-day wait period. Any exemptions to the wait period would require approval by the Vice Chancellor's Review Group.
    - During the 90-day period the supervisor works with Dean/Director/Vice Chancellor to evaluate department workload. Please refer to the attached resource for guidance on how to reorganize a unit: [How to Plan a Reorganization](#)

- Evaluate the duties and responsibilities of the position to verify that they align with the mission of the university and are essential to the operation.
  1. Determine if vacant position job duties can be distributed to other employees within the division?
  2. Determine if the department/division can be reorganized to accommodate the workload.
  3. Evaluate the possibility of coordinating with another division/department.
  4. Consider whether the position needs to be filled full time or can it be filled by a .75 or .80 appointment instead.
  5. Consider whether the position is needed fulltime (or at all) during non-teaching or slower periods.
- b. Complete an IPAR Form [IPAR Form](#)
  - Fill out the form completely, answering each of the questions in detail. ***IPAR forms that are not filled out completely will not be considered and will be returned to be completed.***
- c. Complete the appropriate form/request
  - Vacancies and New Positions
    1. Complete the Position Description card in Page Up
    2. Complete the IPAR Form [IPAR Form](#) and an updated organization chart and submit in PageUp as attachments to the Position Description card
  - Temporary Employees (Formerly known as LTEs)
    3. Complete an IPAR Form [IPAR Form](#) and Temporary Employment Request Form [Temp Employment Request Form](#) and attach an updated organization chart
    4. Staple all documents together
    5. Have the dept chair/unit supervisor sign it and send directly to Human Resources
  - Overloads, Salary Adjustments, Temporary Base Adjustments
    6. Complete a Personnel Transaction Form (PTF). [PTF](#)
    7. Attach the completed IPAR Form [IPAR Form](#) justifying the need for the adjustment.
    8. Staple all documents together
    9. Have the dept chair/unit supervisor sign it and send directly to Human Resources
  - Academic Staff Rehires
    10. Complete a Rehire Form. [Rehire Form](#)
    11. Attach a completed IPAR Form [IPAR Form](#) (one IPAR form may be used for multiple rehire forms when rehiring Instructional Academic Staff)
    12. Staple all documents together
    13. Have the dept chair/unit supervisor sign it and send directly to Human Resources
  - Title Changes for University Staff and Academic Staff (for titles outside a progression series)
    14. Complete title change request process in PageUp ([Title Change Form and Guide](#))
    15. Complete the IPAR Form [IPAR Form](#) and any other documents requested in the Title Change Guide and submit in PageUp as attachments to the Position Description card

- d. Human Resources and the Budget office will review the requests, determine if there are concerns with the request, and notify the submitting office as to whether there are concerns with the request.
  - e. Requests are then submitted to the Vice Chancellors Review Group (VCRG), which consists of:
    - The Vice Chancellor of Academic Affairs and Provost, who chairs the VCRG
    - The Vice Chancellor for Administrative Services
    - The Vice Chancellor for Student Affairs
  - f. If there is no agreement within the VCRG, the VCRG will discuss the request with the Chancellor.
  - g. The submitting office will be notified of the final decision.
2. All positions that are approved to be filled will have the updated position description evaluated by Human Resources, in conjunction with the Budget Office, to determine the appropriate classification, title and salary.
    - a. Human Resources will notify the supervisor of the appropriate classification, title and salary.
    - b. Supervisor can then continue the recruitment process using Page Up and following UW Oshkosh hiring procedures.
  3. Units should monitor the flow of their proposals to ensure that there is not imbalance between pay groups, such as giving preference to higher paid employees in filling vacancies, new hiring or salary increase proposals.
  4. **All** hiring requests, salary adjustment requests and rehires must follow these procedures. **The Chancellor will not be approving any positions or increases outside of the IPAR process.**
  5. Please contact Human Resource and/or the Budget Office with any questions or concerns.

## Increased Personnel Action Review (IPAR) Process

