

REGULATION #4203.1 POSITION CONTROL

1. DEFINITIONS

1.1. What is “Position Control”?

Position Control is the procedure used by the Surrey Board of Education and district management to ensure that through a systematic planning, approval, control and reporting process, every staff position required to deliver services to students and operations, is supported by funding from either the operating budget, special purpose funds or other sources of revenue.

Position control tracks information based on positions rather than employees.

1.2. What is a “Position”?

A position is a specific functional job within an organization.

1.3. What is a “Position Number”?

A position number is a unique “number” that identifies a specific position. This number is made up of characters and numerals. Each number has a defined general ledger account number assigned to a specific fund, function, program and salary object of expenditure, for the purpose of allocating budgetary costs and expenditures incurred from those incumbents assigned to the position number.

1.4. What is a “Full Time Equivalent (FTE)”?

A full time equivalent is the amount of work that is expected to be performed by one incumbent, working full time.

1.5. What is an “Incumbent”?

An incumbent is simply an employee assigned to a position. An incumbent is available to be assigned to one or more positions.

1.6. What is a “Vacancy”?

A vacancy occurs when:

- a) The total sum of incumbents assigned FTE is less than the total budgeted FTE.
- b) A timing delay from a board approved position to assignment of incumbent.
- c) No successful incumbent to the position.

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2. POSITION CONTROL DEVELOPMENT

- 2.1. A Budgeted FTE Entitlement will record, by the accounting classification of expenditure (object), the total FTE positions approved by the board in a budget year.
- 2.2 The Budgeted FTE Entitlement will be the bases for which the budgeted labour costs will be developed, using approved rates of pay from various collective agreements and other factors.

3. POSITION CONTROL MANAGEMENT

- 3.1. Members of senior management who are designated account coordinators will have responsibility for ensuring that all staff assigned to a position under their responsibility, any vacancy posted, and any hiring to the position is within the approved entitlement. Account coordinators will also be involved in the planning process that results in submissions to the board for budget approval
- 3.2. Fiscal Management Services will have the responsibility to provide to each account coordinator data for every budgeted FTE position under his/her responsibility that is recorded in the Budgeted FTE Entitlement Worksheet. The data will be detailed by fund, function, program, classification of expenditure and job classification.
- 3.3. The information included on the Budgeted FTE Entitlement Worksheet will be entered in the Human Resources Information System and applied by Human Resources in verifying that all staff assigned to a position and every request to post or advertise a vacancy is supported by the appropriate FTE position entitlement.

4. POSITION CONTROL REQUESTS OR TRANSFERS

- 4.1 If a member of senior management desires a reallocation in the approved FTE positions – within an object, a recommendation will be made to executive committee. Such a request will be reviewed by the executive committee in the light of the overall FTE position plan and board direction when the operating budget was approved; and to be done with little or no increase in total cost.

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- 4.2 Any request for reallocation of FTE positions which crosses the classification of expenditure (object) or varies from the direction set by the board when the budget was approved, will require an approval from the board.
- 4.3 Requests by members of senior management for increases in FTE positions beyond that approved by the board, which cannot be met through reallocations in FTE positions, must be submitted to the board for approval following review by executive committee.
- 4.4 Changes to the FTE position entitlement as a result of either board or executive committee action, will be communicated to Fiscal Management Services and Human Resources, for implementation.

5. POSITION CONTROL REPORTING

- 5.1. Each account coordinator will be provided a monthly status report. This status report will show the budgeted FTE for each position compared to the assigned FTE allocated per position.
- 5.2. Quarterly reports on the Budgeted FTE Entitlement will be submitted to the board.
- 5.3. Fiscal Management Services and Human Resources Department are to reconcile position control every month. This is to ensure consistency of board approved positions. Any variances must first be addressed with the respective account coordinator for correction. Should there be no attention from the account coordinator, FMS or HR are to advise executive committee immediately.

6. SPECIAL PURPOSE FUNDED POSITIONS

- 6.1 If a budget for a SPECIAL PURPOSE FUND includes a staff component, personnel hired will be under a term specific arrangement. If the intent is to use targeted funds to create permanent positions, prior board approval of the increase in staff complement will be required.

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