Work Prioritization Assessment Template User Guide

Tools: The template and worksheet listed below are referenced throughout this user guide and will support navigation of the work prioritization assessment process:

- Individual Position Data Collection template

- Work Prioritization Assessment worksheet

Goal: The goal of the work prioritization assessment is to identify key job duties performed primarily through the workday and identify additional work duties that an employee is performing (additional duties may or may not be related or to COVID-19 work).

Additional outcomes are listed below:

1. What work can be suspended temporarily (or permanently) that are operational and not adding the ROI back to your institution's community?
2. What work, if any, can be reassigned within a team or shifted from one team to another team either temporarily (or permanently)?
3. Are job descriptions on file for each position accurately conveying the primary duties for those positions?
4. How much time is dedicated to performing key job duties and how much time is dedicated to additional work that may or may not be related to COVID-19 administrative duties?
5. Can a position remain working remote, hybrid, or on site (based on current job duties and new job assignments) as a result of this assessment?
6. Are there tasks that can be automated to reduce administrative time and increase productivity?
7. What groups of skills (or capabilities) have emerged from this assessment to create a plan to reskill or upskill employees for future roles?

Considerations:

Frame discussions with your team to share the purpose and goal of the assessment. Your teams will want to know and trust that this assessment isn't intended to eliminate any jobs — it's intended to achieve the outcomes as outlined above.

Before work begins, meet again with your team leader/teams to **address tactical questions** they may have before collecting any data to add to the worksheet.

- Share gentle reminders that this is not an exercise to cut and paste job duties from a job description.
- It's most reliable when the actual daily duties are documented with a percentage of time to perform each of them.

After your teams have been offered an opportunity to review the worksheet in more detail and you've met with them to address any questions, **assign a deadline date** for the data to be collected and for data to be added to the worksheet.

- The first step is to **document the data** of typical job duties. Use the Individual Position Data Collection template. This is the "source of truth" for any data that is entered into the worksheet. Once the data is collected in the data document for each position, the percentage of time for the key primary and secondary duties can now be determined.

- The second step is to **enter into the** Work Prioritization Assessment worksheet the key duties and frequency of the duty performed and secondary duties and the frequency to perform secondary duties.

Build your worksheet to create your formulas based on your institution's definition of time worked for a full-time equivalent (FTE) position. See below for guidelines to create your formula:

- How do you **define time worked for an FTE** annually?
    - Does the total time worked annually reflect time off (such as Spring or Winter Break) during a work year or does it exclude it?
    - What positions work 10 months or 12 months?
    - What positions are part-time?
    - Do you have temporary positions assigned to your teams that should be noted on your worksheet?
    - The formulas in the worksheet sample assume a 37.5 hour workweek for 52 weeks during the year for a total of 1,950 hours.
- **Create formulas** to calculate the percentage of work for each FTE based on how often the work is performed: Daily, Weekly, Monthly, Quarterly, or Annually.
    - Will you use business days in each month to create these formulas or calendar days (such as 21 business days, on average, in a month, or 30 or 31 calendar days)?
    - The formulas in the worksheet sample use an average of 21 days in each month to determine the percentage of work time.
    - The formulas are then created differently based on whether work is performed daily, weekly, monthly, quarterly, or annually.
    - Create formulas to separately calculate duties that are COVID-19 related and not related to COVID-19.
    - Because constituents may not easily interpret percentage of an FTE (ex., 6% of FTE), create a formula that reverts back to the total number of hours worked. (See subtotal formula in the Work Prioritization Assessment Template.)

- o You'll need a subtotal, by position, of percentage of hours worked for secondary duties (for each position) dedicated to COVID-19, secondary duties dedicated to non-COVID-19 work), and primary duties.
  - ▪ Once all subtotals are calculated for each position, you can create a summary of totals for each of the following categories to share the "big picture."
    - • Summary of total hours dedicated to COVID-19-work — primary duties
    - • Summary of total hours dedicated to non-COVID-19 work — additional duties
    - • Summary of total hours for any duties that can be stopped
    - • Summary of hours for any duties that can be reassigned (you'll already have most of duties that *cannot* be reassigned for compliance, reputational, legal, or any other risks you've identified at your institution)
- • **Organize your worksheets:**
  - o To allow for a variety of uses after collecting the data:
    - ▪ Create 1 worksheet by each position. (This can later be used to identify what similar skills can be grouped by position. For example, instead of a "job family," this can be a "skills capabilities family.")
      - • The "skills capabilities family" can later be used for larger-scale workforce planning to create an action plan to reskill (or upskill) positions.
    - ▪ Create 1 worksheet with separate tabs for each team to prepare for your post-assessment meetings with each functional team (Recruitment, Compensation, Employee/Labor Relations, etc.).
- • Schedule **post-assessment meetings**:
  - o It is recommended to meet with each team leader/team to share the results of the assessment for that team.
  - o You may also want to use this meeting to share results of work being done by other teams and to share the summary of total hours worked (as outlined above).

Frequently Asked Questions:

1. **What if more than 1 employee is in the same position? Does each employee need to create a data document and add their duties to the worksheet?**

   A: Yes, each person performs job duties that may be similar but not exactly the same. It is recommended that each person also participate to create higher engagement and teamwork to participate in the assessment.

2. **Is there a specific format that can be used to highlight the findings?**

A: It is recommended to create a high-level overview to share the findings of the assessment. Also, you may want to create a visual, such as an org chart, of each position that hyperlinks to each worksheet file to lead constituent discussions.

3. **Job descriptions for some of the positions were recently revised or are brand new. Do employees in jobs recently revised or new need to conduct the assessment?**

   A: Yes, this assessment is to provide you with how much time is spent on performing key primary duties, as well as time being spent on additional work, new work, or reassigned work being done as a result of COVID-19.

4. **I have 1 or more temporary positions assigned to perform work. Should I ask these individuals to participate in the assessment?**

   A: Yes, you should request all temporary employees to participate in the assessment if they are contributing to how work is getting done. Add "temporary" next to their position title on the worksheet template. These employees should be included regardless of whether the position is funded by your institution's budget or an auxiliary (staffing agency) budget.

5. **Does this assessment require me to document every job duty? For example, some job duties take 5 or 10 minutes — do those duties need to be documented?**

   A: The purpose of this assessment identifies major duties, which would be defined as duties that are regular in nature (daily, weekly, etc.) on a consistent basis of a minimum of 15 minutes. Duties that are performed on a one-time basis are not considered major duties. Major duties are also: 1) additional duties dedicated to COVID-19 work; or 2) other work added to an employee's job over time; or 3) additional work assigned to an employee's job as a result of COVID-19.