



TOWN OF NORWOOD

PB OPERATING POLICIES AND PROCEDURES



Norwood Town Hall * 566 Washington Street * Norwood, MA 02062



Town of Norwood

PB Operating Policies & Procedures

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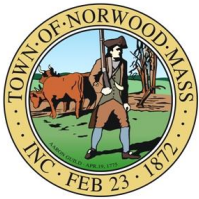
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This section indicates the 9 documents referenced in and attached to this document.

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Town of Norwood

PB Operating Policies & Procedures

1 Overview

- 1.1 The Personnel Board for the Town of Norwood was established and created on May 13, 2002 by amending the Town's By-Laws to include Article XXXIX – see *Appendix A*.
- 1.2 The Personnel Board may in this document be hereinafter referred to as the “Board”.
- 1.3 The Board is comprised of five members, appointed collectively by the Town Moderator, Chairman of the Board of Selectman, and Chairman of the Finance Commission for a three year term beginning May 1st. Board members cannot hold any other elected or appointed position in the Town other than that of Town Meeting Representative¹.
- 1.4 The Appointing Authority for the Board shall make every effort to ensure that a minimum of three (3) of the Board members have “relevant and significant experience or training in personnel administration, or labor, or employment law.”²
- 1.5 The Board shall work with the Human Resources Director to develop various personnel policies. “The personnel policy or policies shall encompass current human Resources practices, provide for fair and equitable treatment of all employees, and include the municipality’s sexual harassment policy and the classification and compensation plans, along with a method to cause the plans to be continuously reviewed and updated using a consistent, accepted method of evaluating job positions.”³
- 1.6 “The Personnel Board shall perform other functions or duties as may be provided in the town bylaws, in a collective bargaining agreement or assigned by town meeting.”⁴
- 1.7 This document contains the current Board’s policy development and guiding procedures/processes. Any previously issued and or dated document is null, void, and superseded by this dated document.
- 1.8 The Board reserves the right to update this policy and procedures document as needed. Any updates or changes to this document will be shared by the Human Resources Department or Board Chairperson.
- 1.9 The Board has adopted a “Code of Conduct”, which members are expected to sign and follow for their length of service on the Board – see *Appendix F*.

¹ By Law

² By Law

³ By Law

⁴ By Law

2 Definitions

2.1 Personnel Board Appointing Authority

The Appointing Authority for all members of the Board includes the Town Moderator, the Chairperson of the Board of Selectmen, and the Chairperson of the Finance Commission.

2.2 Classification Plan

A system of grouping similar positions together under common job titles using a quantitative analysis process to compare duties and responsibilities for commonality of purpose.⁵

2.3 Compensation Plan

A schedule of salaries and pay rates including titles, grades, and step increases that groups similar positions together. A compensation plan may also include additional benefits such as time off, insurance, retirement, and incentives and bonuses.

2.4 Classification

A process by which the Board shall assign a grade and title to a new position request submitted by an Appointing Authority.

2.4.a New Position

There is no position description with a corresponding grade and title in the Classification System.

2.5 Position Description

2.5.a A written document on file with the Human Resources Department that contains general information regarding a position's overall job environment, job characteristics, requisite capabilities, supervisory relationships and responsibility. Position Descriptions do not detail all duties and responsibilities of the position.

2.5.b Each Position Description shall be reviewed and determined to be either "Exempt" or "Non-exempt" from FLSA requirements per the Town's Fair Labor Standards Policy and the law. The Board has adopted an "Exempt Test Process" as part of the FLSA Policy, which outlines the adopted process utilized by the Board and Human Resources Department. Once determined, the Position Description shall indicate either "Exempt" or "Non-exempt" per the most current header/footer format used.

*The detailed information and process utilized is documented in **Administrative Procedure A-103**. A copy of this Administrative Procedure is also maintained with the Human Resources Department and on the Town's website.*

2.5.c Position Descriptions do not constitute an employment agreement between the Employee and the Town of Norwood (employer).

2.6 Reclassification

A process by which the Board shall determine if an employee or position is functioning primarily different than that of the current position description.

⁵ Handbook for Mass Municipal Personnel Boards page 14

2.6.a *Employee Evaluation*

Reclassifying an employee is the process that occurs when an employee's primary duties are in a grade under a certain title, but the employee has been assigned and performing greater than 50% of the tasks of a higher grade.

- This must be on a permanent and consistent basis, not a temporary assignment, which is governed by the Acting Assignment Policy.

2.6.b *Position Evaluation*

2.6.b.i Reclassifying a position is the process that occurs when a position description does not show the true depth and scope of the position. The tasks performed are equal to those performed in another grade thus resulting in moving the position, not the employee, to a different grade.

2.6.b.ii A position evaluation is the formal process that appraises the value of each position in relation to other positions in an organization, based on an analysis of position content, comparable communities, and input of the Department Head and/or Appointing Authority.

3 Personnel Board Administration

3.1 The Board shall hold an annual meeting in May of each year to elect from its members, a Chairperson and Vice-chairperson. Members so elected shall serve in their capacities for one year.

3.2 Regular meetings of the Board are usually held on the third Wednesday of each month. The Board, at its discretion, may change the time and date of its meetings. Meetings are not limited to the third Wednesday of the month and can be held on an as needed basis, at the discretion of the Board. The Human Resources Director is responsible to post all meeting notices according to all applicable Massachusetts laws.

3.3 A person shall be retained to record the meetings of the Board and prepare minutes. Minutes will be kept available, according to applicable Massachusetts law, in the Human Resources Department at the direction of the Human Resources Director and Board Chair.

3.4 The agenda and all applicable information shall be prepared for Board members by the Board Chair or the Human Resources Director or the Director's designee, and should be distributed five days before a scheduled meeting, if possible.

4 Board Vacancies/Re-appointments

4.1 The Board Chairperson shall send notice to the Appointing Authority if a vacancy in the board membership should occur prior to the expiration of a member's term.

4.2 Vacancies shall be filled by the Appointing Authority for the remainder of the vacant member's term.

4.3 The Board Chair is responsible for notifying the Appointing Authority one month in advance of when a member's term of office is to expire. This notification may be in addition to any notices from the Town Clerk's Office.

- 4.4 Board members, whose term is expiring, shall send a letter to the Appointing Authority and Board Chair stating whether or not they wish to be considered for re-appointment. The Board Chair shall ask the Appointing Authority to notify the Board of its decision in a timely manner on or before May 1st.

5 Policy Development

5.1 Development

- 5.1.a The Board, with assistance from the Human Resources Department, is responsible for the development of new personnel policies and the review/update of existing personnel policies.
- 5.1.b The Board has adopted a standard policy format.
 - Section 1. Purpose and Scope
 - Section 2. Applicability
 - Section 3. Definitions
 - Section 4. Eligibility
 - Section 5. Policy
 - Section 6. Provisions
 - Section 7. Applicable Laws / Statutes
- 5.1.c From time to time, a particular policy may have to deviate from the above format due to extensive information that needs to be included, complexities of the issue, or legal requirements. The Board will ensure that deviations from the above format are limited.
- 5.1.d The Board has adopted a standard 2-line footer to ensure key policy information is consistently indicated.

<i>Policy Name & Number</i>	<i>Pages</i>	
<i>Original Adoption Date</i>	<i>Last Public Hearing Date</i>	<i>Last Updated On</i>

5.2 Adoption Process

- 5.2.a The Board, with assistance from the Human Resources Department, will gather information regarding applicable laws, practices, and policies from other communities, the state and private industry.
- 5.2.b The Board or its designee will draft policies.
- 5.2.c The Board will review draft policies.
- 5.2.d The Board shall request input from legal counsel.
- 5.2.e A public hearing shall be held prior to the adoption of any new policy – see Section 5.4.
- 5.2.f The Board will vote whether to adopt the new policy.
- 5.2.g A majority vote of those members present and voting at a duly constituted Board meeting is required for a policy to be adopted.

5.3 Policy Reviews

5.3.a At each annual meeting, the Board may set an existing policy review schedule.

- Existing Personnel Policies should be revisited and reviewed no less than every three years or as necessary by changes in law or practice.

5.3.b A public hearing shall be held prior to the adoption of changes to any existing policy – see Section 5.4.

5.3.c The Board shall vote whether to adopt the revised policy.

5.3.d A majority vote of those members present and voting at a duly constituted Board meeting is required for an updated existing policy to be adopted.

5.4 Hearings

5.4.a The Board shall hold a public hearing on proposed new policies or proposed revisions to existing policies, prior to their adoption. The hearing “shall be publicly advertised at least two weeks prior to the said hearing.”⁶ The Human Resources Department will be responsible to publicly advertise the public hearing, where the Board will gather, and review information from the public.

5.4.b Per a legal opinion from Town Counsel (Murphy, Hesse, Toomey, & Lehane, LLP) dated June 11, 2008, a public hearing is required even if minor changes are to be made to an existing policy – see **Appendix B**.

5.4.c Every person or board, however elected, appointed, or constituted, and empowered to employ persons to perform a service for the Town shall be given written notice of each such hearing.”⁷ The Board Chairperson or Human Resources Department shall ensure the above are delivered a copy of such hearing notice.

5.5 Prior to a final vote to adopt, the Board should hold a meeting during normal working hours, as a means to inform employees of the proposed change(s), as well as to receive feedback. The meeting shall take place at a time and location as determined by the Board Chair and HR Director.

5.6 After a majority vote to adopt, a new or updated personnel policy shall be distributed in the following manner:

5.6.a Appointing Authority/Department Head Notifications

The Board Chair or HR Director is responsible to distribute the adopted policy to all Appointing Authorities and/or Department Heads within General Government via a letter containing the following language (or similar thereof) *"I am writing to let you know that the Town's Personnel Board has adopted a(n) _____[Name of Policy] Policy effective _____. A copy of the policy is attached for your information and records."*

⁶ By Law

⁷ By Law

5.6.b Union and/or Employee Notifications

The HR Director or Town Manager shall establish the implementation date and notify and distribute the adopted policy to each Union representative within General Government via a letter containing the following language (or similar thereof) *"I am writing to let you know that the Town's Personnel Board has adopted a(n) _____ [Name of Policy] _____ Policy effective _____. A copy of the policy is attached for your information and records."*

- 5.6 Oversee the implementation of Board adopted/issued new and revised policies.
- 5.7 Upon adoption of any and all policies, the HR Director will work to "insure consistent interpretation and application of Town policies"⁸ and include all policies in employee orientation. The HR Department is responsible for the compilation of all policies and to make the policies available to employees upon request.
- Interpretation of policy and/or disagreements about policy intent shall be decided by the Board, who shall issue clarifying written communication to the Human Resources Director to "insure consistent interpretation and application of Town policies"⁹.
- 5.8 Nothing in the policies "shall infringe upon a department head's or appointing authority's ability to supervise and discipline employees subject to an appropriate appeal process to the appropriate appointing authority."¹⁰
- 5.9 The Board shall maintain a listing of all adopted policies indicating the original policy adoption date, the last public hearing date and the last updated date.
- 5.10 All adopted Board policies shall be posted on the Town's web site by the Board Chair or the Human Resources Department.

6. Employee or Independent Contractor Determination

- 6.1 The Board follows the advisory issued by the Attorney General's Fair Labor Division on M.G.L. c. 149, s. 148B 2008/1 in determining whether a position is to be classified as an Employee or an Independent Contractor.
- 6.2 The process followed by the Board in making the proper determination is as follows:
- 6.2.a The Board utilizes the Three Prong Test issued with the above referenced state Attorney General Advisory.
 - 6.2.b For a position to be considered an Independent Contractor, the results of all three prong tests must be determined to be an Independent Contractor.
 - 6.2.c The Board Chair or Vice Chair shall document the results of the Board review on the Employee or Independent Contractor Determination document **#D-142**

⁸ By Law

⁹ By Law

¹⁰ By Law

- 6.3 If a majority of the Board, present and voting, is divided on the issue, they may seek advice and/or input from Town Counsel. Any received advice shall be taken into consideration before the Board documents its determination on document **#D-142**
- 6.4 Each participating Board member shall print his/her name, initial the name, date it, and indicate whether the position, based on the process used and information provided, is an Employee or Independent Contractor.
- 6.5 As soon as practical, the Board Chair or Vice Chair shall send a letter to the appropriate Department Head, Appointing Authority, Board of Selectmen, Finance Commission, Town Clerk & Accountant, and HR Director indicating the determination of the position.

*The detailed information utilized, including the MA State Attorney General's Advisory, is documented in **Administrative Procedure A-102**. A copy of this Administrative Procedure is also maintained with the Human Resources Department and on the Town's website.*

7 Classification and Compensation

- 7.1 "All employees in the employment of the Town shall be covered by a classification and compensation plan, as provided by the by-law with the exception of Elected Officials."¹¹
- 7.2 The Town's Classification Plan covers all General Government employees.
 - 7.2.a It should be noted that there are two (2) point factor rating systems within the Town's Classification Plan that is utilized by the Board to determine fair and equitable treatment.
 - Light and Broadband
 - General Government [includes COA, BOH, all Town Departments, Library, BOA, Planning Board, & Retirement Board]
- 7.3 A review of the Town's Classification Plan should occur on a regular basis by both the Human Resources Department and the Board. This review should include both an organizational review (all positions in a unit or department as they interface with each other) and an occupational review (all positions within a particular class reviewed in depth to establish the commonality of the positions and their differences).
- 7.4 The Town's Classification and Compensation Plan should be reviewed yearly by the Human Resources Department to ensure correctness.
- 7.5 Classification and/or compensation studies that would modify the Town's existing Classification and Compensation Plan should be conducted with the participation of the Board.
- 7.6 "An employee or group of employees may make a request for reclassification in writing upon forms provided by the Human Resources Department."¹² "The personnel board shall

¹¹ By Law

¹² By Law

cause a review, subject always to applicable bargaining obligations, to be made of each request.”¹³

8 Classification/Reclassification Procedures

8.1 Classification Procedure

This procedure will be followed by the Board upon the receipt of a request to create and rate a new employee position description (one which is not currently in the Classification Plan for the Town).

- 8.1.a Filing for a new position classification is a multi-step process that includes both the job classification and the funding for the position. The process can include, but is not limited to, the participation of the Department Head, Appointing Authority, Finance Commission, and Town Meeting. The process may take up to a year to complete.
- It is strongly recommended that Appointing Authorities submit requests as early as possible in order to obtain appropriate Town Meeting funding approval to meet anticipated hiring needs.
- 8.1.b Department Heads who anticipate a need for a new classification must begin by seeking organizational authorization from their Appointing Authority. If conceptually approved, a request must be forwarded to the Board from the Appointing Authority, with a copy to the Finance Commission, on document **#D-102 - Classification Request Form** – see *Appendix D*. The most current version is available from the Human Resources Department.
- 8.1.c The Human Resources Director shall work with the Department Head or designee to draft the employee position description. Once the draft employee position description is finalized, the Human Resources Director will conduct a salary survey.
- Salary surveys are based on a Human Resources Department template and shall include, but not be limited to, comparative town data, comparative minimum and maximum salary data, and equivalent employee data.
- 8.1.d Board members, with assistance and input from the Human Resources Director, shall review and adopt/approve a final employee position description to be shared with all involved parties.
- 8.1.e Board members, with input from the Human Resources Director, shall rate the employee position description in accordance with the appropriate Town of Norwood classification rating system.
- 8.1.f The Human Resources Director has the responsibility to amend and maintain the Town’s Classification and Compensation Plan.
- 8.1.f.i If the Board adopts a new employee position description, rates it and grades it, after a majority vote of those Board members present and voting, the Human Resources Director shall amend the Town’s Classification and Compensation Plan to include the new position and

¹³ By Law
Last Update: 02/15/2017

associated information. The update should be completed as soon as possible, but no later than July 1 of the next fiscal year.

- 8.1.f.ii If the new Classification is the result of a consolidation of, or merger of, existing positions that now make those positions void, inactive, or intentionally and permanently vacant, the Human Resources Director shall remove the old position(s) from the Town's Classification and Compensation Plan at the time when the new position is adopted and input into the Town's Classification and Compensation Plan.
- 8.1.g Unless there are extenuating circumstances, within 30 days of its decision, the Board Chairperson shall send a letter to the requesting Appointing Authority, with a copy to the Department Head, the Town Clerk & Accountant, the Finance Commission, and the Board of Selectmen on the outcome of the Board's vote. The letter shall identify the grade, title and annual salary range of the new position.
 - 8.1.g.i See Section 8.4 for an appeal process
- 8.1.h It is the responsibility of the appropriate Department Head or Appointing Authority to seek funding approval, as it is their budget that is being affected. The Board has no financial authority and can only identify to the appropriate parties what financial impact the new position will have on an annual basis. Funding is dependent upon approval by Town Meeting. It is not the role of the Board to seek funding for newly classified positions.
- 8.1.i Board members and/or the Human Resources Director shall be available to Town Meeting and other parties to explain the new classification.
 - 8.1.i.i If the funding source for a new position is expected to be the Town of Norwood, the Department Head or requesting Appointing Authority must submit the funding request to the Finance Commission.
 - 8.1.i.ii If the funding source for a new position is expected to be through a grant or other outside source, the Department Head or Appointing Authority shall notify the Finance Commission and Human Resources Director, and assure the Town that the appropriate overhead costs are included.
- 8.1.j Attached is the process flow chart ("***Classification Process Flow Chart***") [CPFC-1] indicating in a diagrammatical manner the step by step process of a new classification request, which may only come from a Department Head or an Appointing Authority.

8.2 Reclassification Procedure

If an Appointing Authority, Department Head, Employee or Union, on behalf of an Employee, believes that an Employees' classification/position description is inaccurate, they may request a hearing for the reclassification of that position. Filing for the reclassification of a position is a multi-step process that includes the job classification process and funding for the position. The process can include, but is not limited to, the participation of the Department Head, Appointing Authority, Union representative, the Finance Commission, and Town Meeting. The process may take up to a year to complete.

- 8.2.a The process is started by completing document **#D-103 - *Reclassification Request Form*** – see *Appendix E*, which is available from the Human Resources Department.
 - 8.2.a.i If an Appointing Authority or Department Head starts the process, then the completed form shall get filed with the Human Resources Director for further action.
 - 8.2.a.ii If an Employee or the Union starts the process, then the completed form shall get filed with the Department Head for further action with a copy to the Human Resources Department.
 - 8.2.a.iii The requesting party [Appointing Authority, Department Head, Employee or Union] shall submit to the Human Resources Department a marked-up or updated draft employee position description for the Board to consider with submitted document #D-103.
- 8.2.b If needed, the Board shall request the Human Resources Department to provide comparable Town data and comparable position descriptions to the Board for review.
- 8.2.c The Human Resources Director, in consultation with the Board Chairperson, shall schedule a Reclassification Request hearing at a future meeting of the Board, within a 2-month meeting cycle, when possible.
 - The Appointing Authority and/or Department Head and employee(s) shall be invited to a Board hearing to review recommended changes.
- 8.2.d At the hearing, the Board Chairperson shall officially announce that the Board is now going into a hearing to consider the Reclassification Request of an employee's job classification. The procedure shall include, but is not limited to, the following steps:
 - 8.2.d.i The Board Chairperson shall indicate the position submitted for a reclassification consideration and the current employee in the position.
 - 8.2.d.ii The Human Resources Director or designee will outline what the specific issue(s) is/are regarding the Reclassification Request, summarizing the information submitted.
 - 8.2.d.iii The Employee, and/or their representative, will be allowed up to 10 minutes to present his/her case, which should include a rationale of why he/she believes the position should be at a different classification. Documentation and witnesses may also be part of this step.
 - 8.2.d.iv The Human Resources Director or designee will be allowed up to 10 minutes to provide the reasons why the position was classified as is today. The Human Resources Director should also indicate the impact to the town and/or other positions, if this Reclassification Request was successful.

- 8.2.d.v The Board members present and a part of the hearing process, may ask questions of the Employee, Human Resources Director, or their respective representatives.
- 8.2.d.vi The Board Chairperson shall officially close the Reclassification Request hearing.
- 8.2.e After hearing all input and reviewing all submitted data, the Board shall vote to approve an updated position description or leave the existing one as is. This vote does not have to occur the night of the hearing.
- 8.2.f The Board has adopted a standard 2-line footer to ensure key information is consistently indicated:
- | <i>PB Approval Date</i> | <i>Position Description Title</i> | <i>Pages</i> |
|--------------------------|-----------------------------------|-----------------------------|
| <i>Norwood, MA 02062</i> | <i>Grade and Hours per Week</i> | <i>Exempt or Non-exempt</i> |
- 8.2.g If the Board votes to approve an updated position description, they subsequently need to determine if a rerate/reclassification is necessary. The Board will first determine if enough duties and responsibilities have changed or whether a comparison of similarly rated internal position descriptions requires a rate review or whether comparable town data warrants such a rate review. An increase in volume of work or a change in position title, are not reasons to change a position description rating/grade.
- 8.2.h If approved for a rerate, Board members, with input from the Human Resources Director, shall rate the position description in accordance with the appropriate Town of Norwood classification rating system.
- 8.2.i Changes made to an employee position description should not be construed as adding a new position to the Town’s Classification and Compensation Plan.
- 8.2.j Board members present and a part of the hearing process convene for discussion and vote on the Reclassification Request or to take other action. The vote may or may not take place at the end of the hearing. The majority vote of those members present and voting at a duly constituted Board meeting is required for a request to be granted. “The decisions of the Personnel Board are final.”¹⁴ This interpretation of the By-law has been confirmed by Town Counsel (Murphy, Hesse, Toomey, & Lehane, LLP) via a letter dated January 8, 2008 – see **Appendix C**.
- 8.2.j.i See Section 8.4 for an appeal process.
- 8.2.j If the Board’s vote on a reclassification comes out at a different grade than is in the Town’s Classification and Compensation Plan, the following shall apply:
- 8.2.j.i If the rating result is based on a newly adopted or completely updated Classification and Compensation Plan being implemented and is a higher classification, the approved annual salary/wages shall be at the Step of the Grade that is just above the employee’s current annual salary/wages.

¹⁴ By Laws
Last Update: 02/15/2017

- *Increases over \$3,000 will be split over the number of years that keep the annual raise not to exceed \$3,000, excluding annual cost of living increases. This is known as the Implementation Rule.*

8.2.j.ii If the rating result is based on an existing/previously implemented or current Classification and Compensation Plan and is a higher classification, the approved annual salary/wages shall be at the Step of the Grade that is just above the employee’s current annual salary/wages.

NOTE: If, as a result of application of Section 8.2.j.i and the new Step Date, the employee is scheduled to receive fewer wages within the next 52 week period than the employee would have earned in his or her prior position or grade, then the new Step Date shall be moved forward for the following year to ensure that the employee’s wages increase for that 52 week period to the lowest amount above \$1 that the employee would have earned had he or she remained in his or her prior position or grade. The adjusted Step Date shall be the new permanent Step Date going forward for this position.

8.2.j.iii If the rating results in a lower classification, salary/wage changes shall only affect future position vacancies. Existing employees would be redlined, so as not to affect their current wages for as long as they remain in that position

8.2.j.iv The Employee, Department Head, Appointing Authority, Town Clerk & Accountant, Finance Commission and Board of Selectmen shall be notified in writing. The letter shall include the results of the Board’s decision and identify the anticipated financial impact, if any. The Board notification will include the change in grade, step, current fiscal year financial impact, and annual fiscal year impact.

- *The effective date of any approved reclassification shall be the date the Board voted such a change and implemented at the beginning of the next week. Such date shall be included in the notification letter.*

8.2.j.vi It is the responsibility of the appropriate Department Head or Appointing Authority to seek funding approval, as it is their budget that is being affected. The Board has no financial authority and can only identify to the appropriate parties what financial impact a change in classification will have during the current and/or future fiscal year(s). Funding is dependent upon approval by the Finance Commission and/or Town Meeting. It is not the role of the Board to seek funding for classification changes.

8.2.k The Human Resources Director has the responsibility to amend the Town’s Classification and Compensation plan as necessary.

8.2.l “No employee may make a request for reclassification of the same position in consecutive fiscal years.”¹⁵

¹⁵ By Laws
Last Update: 02/15/2017

- 8.2.m Unless there are extenuating circumstances, within 75 days of the close of the hearing, the Board Chairperson shall send a letter to the appropriate parties as indicated in 7.2.j.
- 8.2.n From time to time it may be necessary to change the name of a position during the reclassification process in order to clarify the position in more modern terms. That change will not be construed as the adding of a new position. The newly renamed position will be identified by the Board as a reclassification at time of notification. The Human Resources Director shall notify all parties including the Finance Commission and Town Clerk & Accountant.
- 8.2.o Board members and/or the Human Resources Director shall be available to Town Meeting and other parties to explain the change in the classification and compensation plan and the funding required due to its decision.
 - 8.2.o.i If the funding source for a granted reclassification is expected to be the Town of Norwood, the Department Head or requesting Appointing Authority must submit the funding request to the Finance Commission.
 - 8.2.o.ii If the funding source for a granted reclassification is expected to be through a grant or other outside source, the Department Head or Appointing Authority shall notify the Finance Commission and Human Resources Director, and assure the Town that the appropriate overhead costs are included.

NOTE: If funding is not approved, it is the responsibility of the Department Head to ensure the affected employee does not perform tasks above their current classification.

- 8.2.p The Human Resources Director has the responsibility to amend and maintain the Town's Classification and Compensation plan.
 - 8.2.p.i If the Board approves a Reclassification Request, the Human Resources Director shall amend the Town's Classification and Compensation Plan for that individual. The update should be completed as soon as possible, but no later than July 1st of the next fiscal year.
 - 8.2.p.ii If the Reclassification is the result of a consolidation of, or merger of, existing positions that now make those positions void, inactive, or intentionally and permanently vacant, the Human Resources Director shall remove the old position(s) from the Town's Classification and Compensation Plan. The Human Resources Director shall remove the old position(s) from the Town's Classification and Compensation Plan at the time when the new position is adopted and input into the Town's Classification and Compensation Plan.
- 8.2.q Attached are the process flow charts indicating in a diagrammatical manner the step by step nature of both types of reclassification requests: (1) from an Employee and/or their supporting Union [RPFC-1]; and, (2) from the Department Head and/or Appointing Authority [RPFC-2].

- 8.3 Rating Documentation
- 8.3.a It is the policy of the Board to document the outcome of each Classification or Reclassification Request rating, after the Board votes to rate the new or updated employee position description.
 - 8.3.b In addition to any letters referenced in the appropriate procedures, the Board shall document their final ratings and grade on the most current version of the ***Classification Rating & Summary Sheet [see Appendix H]***.
 - 8.3.c The PB Chair or Vice-chair is responsible for filling-in this document and after obtaining all required names & initials, shall provide the original or copy to the HR Director.
 - 8.3.d The HR Director has the responsibility to place a copy of the filled-out document in either the position description folder or the employee's personnel file, for public records/documentation purposes.
- 8.4 Rating Decision Appeal – If the Appointing Authority disagrees with the outcome of the decision regarding a Classification or Reclassification Request, an appeal may be filed.
- 8.4.a Appointing Authorities must submit document ***#D-107 Classification / Reclassification Decision Appeal [see Appendix I]*** within 30 days from the date of the issued decision letter.
 - 8.4.b The Board shall review the submitted appeal within 30 days or at the next meeting of the Board, whichever is later, unless circumstances prevent such action.
 - 8.4.c The Board may request the Appointing Authority, or their representative, be present to review the appeal form/circumstances.
 - 8.4.d Board members present and a part of the original hearing process shall discuss and vote on the appeal or to take other action. The vote may or may not take place at the end of the hearing. The majority vote of those members present and voting at a duly constituted Board meeting is required for an appeal to be granted.
 - 8.4.e Subsequent to the appeal decision, the Board Chair or Vice-chair shall issue an appeal decision letter within 10 days of the vote. This decision is final and there are no more appeals available.

9 Classifying an Employee Position Description

9.1 The Board utilizes the Town adopted Human Resources Services, Inc. (HRS) “Municipal Position Classification and Rating Manual” in making a position classification determination.

9.2 *Evaluation System*

The adopted system has been developed to specifically include an emphasis on customer service, the increased use of information technologies, and a higher level of demand and complexity for municipal positions. The logical relationships between the descriptive categories have also been strengthened.

9.3 *Method*

Positions are evaluated several times, one for each job factor. This is done by comparing the position’s content on one factor (e.g., its complexity) with a descriptive measurement scale and repeating the process for all other factors. Each scale contains degree levels describing increasingly higher levels of the relevant factor. Each degree level carries with it a specific number of points. An evaluator/rater determines which degree level definition best describes the content of the position. Points are awarded on each factor scale, then added together to determine the position’s overall point score. The total score determines the pay grade to which the position will be assigned.

9.4 *Factors*

The Town of Norwood’s point factor evaluation system utilizes five categories and fourteen widely accepted factors and degrees of applicability as the basis for determining position worth. The following factors are used for most of Norwood’s employee position descriptions:

<p>1. <i>Physical Environment of the Job</i></p> <ul style="list-style-type: none">• Physical Environment <p>3. <i>Requisite Capabilities</i></p> <ul style="list-style-type: none">• Basic Knowledge, Training & Education• Problem Solving Skills and Effort• Physical Skills and Effort• Experience <p>5. <i>Responsibility</i></p> <ul style="list-style-type: none">• Judgment and Initiative• Accountability	<p>2. <i>Job Characteristics</i></p> <ul style="list-style-type: none">• Interactions with Others• Confidentiality• Occupational Risks• Complexity <p>4. <i>Supervisory Relationships</i></p> <ul style="list-style-type: none">• Supervision Received• Supervision Given• Supervision Scope
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9.5 *Points Assigned to Factor Degrees*

Board raters are allowed to use one-half degree selections, if the rater believes that the employee Position Description either does not contain enough elements to warrant a full degree rating or if 2 degree factors contain relevant partial elements within the employee Position Description. In these cases, the appropriate assigned points would be split. For example a rating of 1.5 under Physical Environment would equal 7.5 points [the halfway point between 5 and 10]; a rating of 3.5 under Complexity would yield 17.5 points [the halfway point between 15 and 20], etc.

9.6 *Grade Determination Scale*

The Board utilizes an adopted/updated **Grade Determination Scale [Appendix G]** for use with the HRS Manual. The scale sheet clearly distinguishes the points within each grade. The adopted scale only changes HRS’ scale at the top and bottom score ranges to prevent an unknown grade result. Since the Board utilizes one-half degree selections it was possible for a top or bottom number in a range to be excluded in the old scale.

9.7 *Documentation*

- 9.7.a When the Board approves an employee position description to be rated through a Classification request or Reclassification Appeal, it shall document the Board's point factor ratings on the most current version of the *Classification Rating & Summary Sheet [see Appendix H]*.
- 9.7.b The PB Chair or PB Vice-chair is responsible for filling in the document and after obtaining all raters names, initials and dates, shall provide a copy to the HR Director and keep the original with the Classification or Reclassification file.
- 9.7.c The PB Chair or Vice-chair is required to send out any/all formal letters regarding the Classification or Reclassification determination to the Employee, Department Head, Appointing Authority, Board of Selectmen, Finance Commission, Town Clerk & Accountant and HR Director. The required information to be provided in the letter is indicated in the appropriate Classification or Reclassification Appeal process within this PSPP.
- 9.7.d The HR Director has the responsibility of retaining a copy within the Classification or Reclassification file of the position rated and/or the employee's personnel file.

10 **Employee Position Description Reviews**

- 10.1 In conjunction with Section 2.5.b '*Position Evaluation*' and the Town by-law governing the Board's responsibilities, it is incumbent upon the Board to have a process and method of reviewing existing position descriptions to ensure they are accurate, reflect current job responsibilities and functions, and to evaluate whether the position is rated appropriately.
- 10.2 Existing Position Descriptions may be reviewed at the request of an Appointing Authority or Department Head, or a majority of the Board, as the needs of the Town or the requirements of the position change.
- 10.3 There is a standard format/template that the Human Resources Department utilizes in developing Position Descriptions, which shall be followed.
- 10.4 Such reviews are a result of, but are not limited to:
- Organizational change
 - Technology change
 - Other created positions that impact the existing position
 - Changes in position duties and responsibilities
 - Effect of union contracts on the work being completed
 - Pressures from outside influences (such as the private sector) on an existing organization
 - Internal or external comparisons of similarly rated positions
 - Changes in law
- 10.5 Update Process
- 10.5.a If the Board determines that a position description is to be updated, the Board shall follow the following process:

- 10.5.a.i The Board may seek written comments and updates from the appropriate Appointing Authority, Department Head and employee(s).
- 10.5.a.ii The Appointing Authority and/or Department Head and employee(s) may be invited to a Board hearing to review recommended changes.
- 10.5.a.iii The Human Resources Department shall provide comparable Town data and comparable position descriptions to the Board for review, upon request.
- 10.5.a.iv After hearing all input and reviewing all submitted data, the Board shall vote to approve an updated position description or leave the existing one as is. This vote does not have to occur the night of the hearing.
- 10.5.a.v If the Board votes to approve an updated position description, they subsequently need to determine if a rerate/reclassification is necessary.
- 10.5.b The Board is not required to rate the updated position description. The Board will first determine if enough duties and responsibilities have changed or whether a comparison of similarly rated internal position descriptions requires a rate review or whether comparable town data warrants such a rate review. An increase in volume of work or a change in position title, are not reasons to change a position description rating/grade.
- 10.5.c Changes made to a position description should not be construed as adding a new position to the Town's Classification and Compensation Plan.
- 10.5.d The majority vote of those members present and voting at a duly constituted Board meeting is required for a rating to be approved. If the Board votes to complete a rate review and the classification comes out at a different grade than is currently in the Town's Classification and Compensation Plan, the following shall apply:
 - 10.5.d.i If the rating results in a higher classification, the Employee, Department Head, Appointing Authority, Finance Commission and Board of Selectmen shall be notified in writing. The letter shall include the results of the Board's decision and identify the anticipated financial impact, if any. The Board notification will include the change in grade, step, current fiscal year financial impact, and annual fiscal year impact.
 - *The effective date of any approved reclassification shall be the date the Board voted such a change and implemented at the beginning of the next week. Such date shall be included in the notification letter.*
 - 10.5.d.ii It is the responsibility of the appropriate Department Head or Appointing Authority to seek funding approval, as it is their budget that is being affected. The Board has no financial authority and can only identify to the appropriate parties what financial impact a change in classification will have during the current fiscal year. Funding is dependent upon approval by Town Meeting. It is not the role of the Board to seek funding for classification changes.

10.5.d.iii If the rating results in a lower classification, the appropriate Department Head, Appointing Authority and Finance Commission shall be notified of the change, which shall only affect future position vacancies. Existing employees would be redlined so as not to affect their current wages for as long as they remain in that position.

10.5.e The Human Resources Director has the responsibility to amend the Town’s Classification and Compensation plan as necessary.

11 Comparable Towns

- 11.1 For purposes of policy development, salary surveys, position description reviews, classification and reclassification, and other Human Resources and personnel matters, the Board gathers data and information from a variety of sources throughout the state of Massachusetts, both public and private entities.
- 11.2 For specific salary, headcount, org charts, position descriptions related to Classifications and Reclassifications, the Town of Norwood generally utilizes comparable town data from a list of municipalities deemed similar to Norwood.
- 11.3 The methodology, development and current lists of MA Comparable Towns are indicated on Appendix J-1 through J-4 of this document.

12 Appointing Authorities

- 12.1 The Town of Norwood has 11 Appointing Authorities that have the ability to hire personnel, thereby having oversight and responsibility of Town employees. One of the key reasons in developing policy is to ensure all Appointing Authorities are following the same rules and protocols in dealing with employee situations and circumstances. The Board, through policy development that applies to all Town General Government employees, avoids the “disparity in the treatment of employees”.
- 12.2 The eleven (11) Appointing Authorities in General Government of the Town are:

• Board of Selectmen	• Town Manager
• Town Clerk and Accountant	• Town Treasurer and Collector
• Library Trustees	• Board of Health
• Council on Aging	• Airport Commission
• Conservation Commission	• Planning Board
• Zoning Board of Appeals	•

13 Reports

During the course of each year, the Board should maintain and publish information related to:

- Annual Goals - indicating what the Board is planning to work on during the upcoming year, either on its own initiative or at the request of others.
- Board Activities – a document that details the major initiatives and/or issues the Board is working on and has completed during the year. This shall be a running status report to be

shared as determined by the Board and available to all as public information through the Board Chair and the Human Resources Director.

- *Annual Report* - highlighting and detailing its accomplishments during the past calendar year and submitted by the Board Chair and Human Resources Director to the Town Clerk for submission in the Town of Norwood Annual Report.

14. Public Access

This document (PBOPP) and all associated documents, policies, administrative procedures and guidelines are accessible from the Town’s website – www.norwoodma.gov under Public Documents in the Human Resources section or under the Personnel Board section through Committee/Boards.

15. Changes in Law

Changes in Law do not discredit an entire policy or procedure, only those portions deemed not in compliance.

16. Appendix Table

Document	Document Explanation	Date	Section
Appendix A**	Town By-law, Article XXXIX	05/13/2002	All
Appendix B**	Legal opinion from MHTL regarding public hearing requirements.	06/11/2008	5.4.b
Appendix C**	Legal opinion from MHTL indicating that reclassification decisions of the Board are final subject only to funding by Town Meeting.	01/08/2008	7.2.d
Appendix D* [#D-102]	Classification Request Form – required to be filled out by the Appointing Authority or Department Head to request the establishment of a new employee position within the Town’s Classification and Compensation plan.	10/28/2008	7.1.b
Appendix E* [#D-103]	Reclassification Request Form – to be completed by the Employee, Union, or Department Head and filed with the Human Resources Director if someone believes an existing active employee is working greater than 50% of the tasks of a higher grade.	10/28/2008	7.2.a
Appendix F**	Board Code of Conduct for the Personnel Board.	03/21/2012	1.9
Appendix G**	Grade Determination Scale used in determining the final classification grade after completing an employee position description rating.	09/19/2012	9.6
Appendix H**	Classification/Rating Summary Sheet used to document the point factor ratings for a new employee position description Classification or a Reclassification Appeal.	05/01/2013	9.7.a
Appendix I** [#D-107]	Classification / Reclassification Rating Decision Appeal	08/17/2016	8.4
Appendix J1 thru J4**	Data and Methodology used in developing Comparable Towns and current list of Comparable Towns	02/15/2017	11

* This form is available from the Human Resources Department and may be updated at any time and is also located on the Town's web-site under Personnel Board.

** This document is located on the Town's web-site www.norwoodma.gov under Committee/Boards, then Personnel Board.

PERSONNEL BOARD

For the Personnel Board: David E. Hajjar 02 / 16 / 2017

David E. Hajjar, Chairman
Patterson Riley, Vice-chair
Willard Krasnow
John E. Taylor
Gregg Giambanco

TOWN OF NORWOOD – PERSONNEL BOARD

CPFC-1

Classification Process Flow Chart

This is a multi-step process. The 1st step is get a new position description rated and classified by the PB. The 2nd step is to obtain funding.

Please note that the Personnel Board does not authorize funding of any new position – we rate and classify positions.

AA refers to Appointing Authority
DH refers to Department Head
HR refers to Human Resources
PB refers to Personnel Board

DH must seek organizational approval from the appropriate AA and if approved, submit a completed **#D-102 Classification Request Form** ** to the HR Department.

HR Director works with the AA or their designee in developing an appropriate position description.

Once completed, the HR Director will conduct a salary survey and forward all appropriate information to the PB.

Upon receipt, the PB, with assistance from the HR Director, shall review and adopt/approve a final position description to be shared with all involved parties.

** Most current version is available from the HR Department

- The HR Director will amend the Town’s Classification Plan to include the new position and rating.
- The PB will notify the AA, DH, Finance Commission, Board of Selectmen and Town Clerk/Account of the rating results, including grade, title and annual salary. **
- **If the AA disagrees with the PB decision, there is an appeals process – see Section 8.4 and/or the APFC -1 below**

After a majority vote to adopt, the PB rating & classification of the position description is final.

The PB shall document all rater results on the Classification and Rating Summary sheet.

The PB shall subsequently rate the position description in accordance with the Town’s classification system.

If the funding source is expected to be the Town, the DH must submit their request to the Finance Commission and Town Meeting. PB members and/or the HR Director will be available to support the appropriateness of the classification / rating.

Once notified, the DH or AA is required to seek budget funding for the new/added position from the Finance Commission and/or Town Meeting.

If the funding source is expected to be through a grant or other outside source, the DH shall notify the Finance Commission and HR Director, and document to the Town that the appropriate overhead costs are included.

** The PB shall make every effort to make notification within 30 days of its decision.

TOWN OF NORWOOD – PERSONNEL BOARD

RPFC-1

Reclassification Process Flow Chart – Employee / Union Initiated

AA refers to Appointing Authority
DH refers to Department Head
HR refers to Human Resources
PB refers to Personnel Board

Employee/Union identifies possible reclassification issue(s) and data by submitting a completed **#D-103 *Reclassification Request Form***** to the DH with a copy to the HR Director. An updated position description shall be submitted with #D-103.

DH reviews info & data and provides feedback on reclassification issue – notifies Employee / Union.

DH concurs with Employee / Union?

Employee / Union agrees with DH – no further action taken.

**Most current version is available from the HR Department

After hearing, PB shall determine if position description should be changed and if so, whether updated position description should be rerated.

PB will make every effort to hold a hearing within a 2-month meeting cycle after receipt of request, which includes the filled out forms.

Employee/Union forwards completed *Reclassification Request Form* to HR Director for scheduling of a hearing with PB

The decisions of the PB are final.

Unless there are extenuating circumstances, within 75 days after conclusion of the hearing, the PB shall send written notification to all parties of final decision, which will include the Employee, Union, DH, AA, and Finance Commission.

If the PB decision is in agreement with Employee / Union, the notification letter will include the current FY financial impact. The effective date shall be the date the appeal was filed with the HR Department.

- Please note that actual funding of a granted/approved reclassification must be approved by Town Meeting, in accordance with Article XXXIX of Town By-laws.
- It is the responsibility of the AA/DH to obtain approval from Town Meeting through their own budgetary justification.

TOWN OF NORWOOD – PERSONNEL BOARD
Reclassification Process Flow Chart - AA or DH Initiated

RPFC-2

AA refers to Appointing Authority
DH refers to Department Head
HR refers to Human Resources
PB refers to Personnel Board

AA/DH identifies possible reclassification issue(s) and data by submitting a completed #D-102 **Reclassification Request Form** to the HR Director. **

HR Director reviews info & data and provides feedback on reclassification issue - notifies AA/DH.

HR Director concurs with AA/DH?

AA/DH agrees with HR Director – no further action taken.

**Most current version is available from the HR Department

YES

YES

NO

Appeal by AA/DH?

After the hearing, PB shall determine if position description should be changed and if so, whether updated position description should be rerated.

PB will make every effort to hold a hearing within a 2-month cycle after receipt of request, which includes all the filled out forms.

AA/DH/HR forwards completed **Reclassification Request Form** to the PB for scheduling of a hearing.

The decisions of the PB are final.

Unless there are extenuating circumstances, within 75 days after conclusion of the hearing, the PB shall send written notification to all parties of final decision, which shall include the DH, AA, and Finance Commission.

- If PB decision is in agreement with AA/DH, the notification letter will include the current FY financial impact. The effective date shall be the date the appeal was filed with the HR Department.
- If the AA disagrees with the PB decision, there is an appeals process – see Section 8.4 and/or the APFC -1 below

- Please note that actual funding of an approved reclassification must be approved by Town Meeting, in accordance with Article XXXIX of Town By-laws.
- It is the responsibility of the AA/DH to obtain approval from Town Meeting through their own budgetary justification.

TOWN OF NORWOOD – PERSONNEL BOARD

Classification / Reclassification Decision Appeal Process Flow Chart

APFC-1

AA refers to *Appointing Authority*
HR refers to *Human Resources*
PB refers to *Personnel Board*

AA disagrees with the Classification or Reclassification grade decision by the PB. AA may complete and submit document **#D-107 Rating Decision Appeal** form** and submit to the HR Director within 30 days from the date of the issued decision letter.

HR Director reviews information submitted and adds any other required data for the PB on #D-107.

HR Director submits #D-107 to the PB Chair for inclusion on an upcoming meeting agenda.

**Most current version is available on-line under Personnel Board

Unless there are extenuating circumstances, the PB shall hold a review within 30 days or at their next meeting. The AA or representative may be asked to attend.

Only PB members present and a part of the original hearing process may participate in the appeal.

The majority vote of those members present and voting at a duly constituted PB meeting is required for an appeal to be granted,

Subsequent to the appeal decision, the PB Chair or Vice-chair shall issue an appeal decision letter within 10 days of the vote. This decision is final and cannot be appealed further.

- **Please note that actual funding of an approved Classification or Reclassifications must be approved by Finance Commission and/or Town Meeting, in accordance with Article XXXIX of Town By-laws.**
- **It is the responsibility of the AA/DH to obtain approval from the Finance Commission or Town Meeting through their budgetary submission.**