



**SAMUEL MERRITT UNIVERSITY
HUMAN RESOURCES DEPARTMENT**

**Leveling Guide Draft
Version 5.0**

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Leveling Guide Instructions

1. Ensure that an updated job description is on file.
 - Job descriptions should be the result of discussion and agreement between the manager and employee.
2. Determine the job's *primary* role. Jobs at Samuel Merritt University fall into one of the following three roles:
 - *Administrative and Operational Role:*
 - Provides administrative and/or support and services to faculty, staff or students.
 - May have formal responsibility for supervising student workers; however, the role primarily contributes through providing support.
 - *Professional or Technical Roles:*
 - Provides professional or technical support and services to faculty, staff or students within a functional area.
 - May have formal responsibility for supervising others; however the role primarily contributes through providing professional or technical support.
 - *Managerial Roles:*
 - Provides professional or technical support and services to faculty, staff or students by leveraging the skills of others and managing a program, department or major functional area.
3. Once the appropriate role has been selected, review the detailed grade contribution profiles for that role to assign the job to a grade.
 - The grade selected should reflect the closest match to the contribution expected of the job *the majority of the time*.
 - It is to be expected that aspects of *other* contribution levels/grades may be present from time to time for any particular job.



Samuel Merritt University Leveling Matrix

Administrative and Operational Support Roles

Role Description: Provides administrative and/or support and services to faculty, staff or students. The job may have formal responsibility for supervising student workers; however, the role primarily contributes through providing administrative or operational support.

Grade	Knowledge	Guidance & Independence	Impact & Scope	Representative Activities (Illustrative Only)
2 <ul style="list-style-type: none"> • <i>1-3 years related administrative/operational experience</i> • <i>May require on the job training</i> 	<ul style="list-style-type: none"> • Applies thorough knowledge of processes, policies and procedures • Applies working knowledge of University services, operations and standards 	<ul style="list-style-type: none"> • Works under periodic supervision and is guided by established processes and procedures • Uses basic analytical skills such as verifying data/information and checking calculations and forms to resolve problems <ul style="list-style-type: none"> ➤ Refers more complex matters to a supervisor • May assist in training or orientation of new employees 	<ul style="list-style-type: none"> • Completes standard tasks and assignments • Requires some judgement and independent decision-making with work results impacting workflow, service or quality standards within the department 	<ul style="list-style-type: none"> • Prepares, processes and verifies documentation • Maintains the operation of equipment or facilities • Applies appropriate procedures to analyze and investigate the cause of errors • Coordinates documentation paperflow • Builds and maintains databases • Responds to detailed, process related inquiries internally and externally and appropriately routes complex problems
3 <ul style="list-style-type: none"> • <i>3-5 years related administrative experience</i> • <i>May require on the job training</i> 	<ul style="list-style-type: none"> • Applies advanced knowledge of processes, policies and procedures • Applies thorough knowledge of University services, operations, and standards 	<ul style="list-style-type: none"> • Works minimal supervision and is guided by established procedures and policies • Uses research and evaluation skills to seek clarification and select appropriate policies and procedures to resolve problems <ul style="list-style-type: none"> ➤ Exceptions are typically resolved with a supervisor's concurrence • May provide guidance and/or supervision to other administrative staff 	<ul style="list-style-type: none"> • Completes variety of non-routine tasks and assignments • Decisions and recommendations impact workflow, service or quality standards across related work units or departments 	<ul style="list-style-type: none"> • Researches department matters using reference materials and/or internal and external agencies • Creates and generates routine and ad hoc administrative reports • Provides customer service, initiating and responding to detailed inquiries • Supports and coordinates the development and production of department/program materials and communications • Maintains external relationships with related agencies, suppliers, etc.
4 <ul style="list-style-type: none"> • <i>5 or more years related experience</i> • <i>May require some experience supervising and guiding others</i> • <i>May require a bachelors degree</i> 	<ul style="list-style-type: none"> • Applies technical expertise within an administrative or operational function • Applies an in-depth understanding of the University services, operations and standards 	<ul style="list-style-type: none"> • Works under general direction and/or is guided by established policies • Uses research and evaluation skills to probe beyond the stated situation to identify underlying issues <ul style="list-style-type: none"> ➤ Resolves most exceptions independently by applying policies and precedents or makes recommendations to adapt procedures to manager or supervisor 	<ul style="list-style-type: none"> • Completes administrative assignments that may be ambiguous in character • May deliver involved student or external customer service activities that can affect the image of the University in the short-term • Decisions and recommendations impact workflow, productivity and service or quality across the University 	<ul style="list-style-type: none"> • Independently drafts agendas and correspondence • Prepares proposals • Supports and represents committees, events and ceremonies to external agencies • Prepares, maintains and coordinates department budgets • Analyzes and compiles statistical data to support strategic and planning activities



Samuel Merritt University Leveling Matrix

Professional Roles

Role Description: Provides professional or technical support and services to faculty, staff or students within a functional area. The job may have formal responsibility for supervising others; however the role primarily contributes through providing professional or technical support.

Grade	Knowledge	Guidance & Independence	Impact & Scope	Representative Activities (Illustrative Only)
4 <ul style="list-style-type: none"> • <i>May require a bachelors degree in technical or professional field</i> 	<ul style="list-style-type: none"> • Applies basic or focused knowledge in a professional or technical field 	<ul style="list-style-type: none"> • Works under general direction and/or is guided by established policies • Uses research and evaluation skills to probe beyond the stated situation to identify underlying issues <ul style="list-style-type: none"> ➤ Resolves most exceptions independently by applying policies and precedents or makes recommendations to adapt procedures to manager or supervisor 	<ul style="list-style-type: none"> • Completes standard assignments within technical or professional field • May deliver involved student or external customer service activities that can affect the image of the University in the short-term • Decisions and recommendations impact workflow, productivity and service or quality across the University 	<ul style="list-style-type: none"> • Provides focused technical services, trouble shooting and training to system or program users • Delivers standard technical or professional service and maintenance programs • Researches and recommends process improvements or program enhancements • Delivers student services, representing the University and its programs internally and externally
5 <ul style="list-style-type: none"> • <i>3 to 5 years related professional/technical experience</i> • <i>Bachelors degree or certification within professional/technical specialty</i> <ul style="list-style-type: none"> ➤ <i>May require an advanced degree</i> 	<ul style="list-style-type: none"> • Applies thorough knowledge of the principles, concepts and methods of a professional or technical field 	<ul style="list-style-type: none"> • Work is guided by policies and professional or technical standard • Integrates research and analytical skills to independently evaluate appropriate techniques and determine objectives and approaches to assignments and projects • May coordinate workflow, provide guidance and/or supervise others 	<ul style="list-style-type: none"> • Completes a wide range of assignments and coordinates processes and projects within a technical or professional field • May develop and maintain important external relationships or represent the University within the larger community • Decisions and recommendations impact department results and workflow, productivity and service or quality across the University 	<ul style="list-style-type: none"> • Administers aspects of professional/functional area programs (finance, accounting, human resources, IT, etc) • Researches and drafts reports, program materials and communications for internal or external customers • Provides input into department or program strategy and plan implementation development • Collects information, maintains relationships and analyzes data within area of specialty to support department decision-making processes and organizational recommendations
6 <ul style="list-style-type: none"> • <i>5 or more years related professional/technical experience</i> • <i>Bachelors degree or certification within professional/technical specialty</i> <ul style="list-style-type: none"> ➤ <i>Advanced degree may be required</i> ➤ <i>May require previous people management experience</i> 	<ul style="list-style-type: none"> • Applies professional expertise and advanced knowledge of the principles, concepts and methods of a professional or technical field 	<ul style="list-style-type: none"> • Work is guided by professional or technical standards and specific department or program goals and objectives • Integrates research and analytical skills to independently determine approaches to delivering program or department services • May supervise others and maintains full responsibility for the day to day operations of a program 	<ul style="list-style-type: none"> • Completes complex assignments and manages the effective delivery of overall program services • Develops and maintains significant external relationships <ul style="list-style-type: none"> ➤ May influence the public image of the University • Decisions impact organizational results 	<ul style="list-style-type: none"> • Provides authoritative advice and professional expertise • Develops program strategies and is responsible for the implementation of those strategies • Develops key internal and external relationships to support program delivery • Develops organizational policies within field of expertise



Samuel Merritt University Leveling Matrix

Managerial Roles

Role Description: Provides professional or technical support and services to faculty, staff or students by leveraging the skills of others and managing a program, department or major functional.

Grade	Knowledge	Guidance & Independence	Impact & Scope	Representative Activities (Illustrative Only)
6 <ul style="list-style-type: none"> • <i>5 or more years related professional/technical experience</i> • <i>Bachelors degree or certification within professional/technical specialty</i> • <i>Advanced degree may be required</i> • <i>May require previous people management experience</i> 	<ul style="list-style-type: none"> • Applies advanced knowledge and professional expertise 	<ul style="list-style-type: none"> • Work guided by professional or technical standards and specific department or program goals and objectives • Integrates research and analytical skills to independently determine approaches to delivering program or department services 	<ul style="list-style-type: none"> • Manages the effective delivery of overall program or department services • Develops and maintains significant external relationships <ul style="list-style-type: none"> ➤ May influence the public image of the University • Decisions impact organizational results 	<ul style="list-style-type: none"> • Oversees the day-to-day operations of one or more related departments, with full accountability for departmental effectiveness and results <ul style="list-style-type: none"> ➤ Hires, trains, coaches and motivates employees • Develops and recommends policies to support delivery of departmental objectives and support the integrity of the overall organization • Takes a leadership role while serving on University committees • Ensures department compliance to all internal, professional, government and legal standards
7 <ul style="list-style-type: none"> • <i>8 or more years of professional experience</i> • <i>Previous senior management experience</i> • <i>Bachelors, advanced degree and/or certification within professional specialty</i> 	<ul style="list-style-type: none"> • Applies professional expertise and a thorough understanding of the University's strategy and mission • Leverages the skills and knowledge of others 	<ul style="list-style-type: none"> • Work is guided by professional standards and the broad goals and objectives of the business unit or functional area • Provides leadership and independently implements business unit or functional area strategy 	<ul style="list-style-type: none"> • Develops and implements operational plans for a business unit or functional area • May foster and develop significant external relationships and/or impact the public image of the University • Decisions and management results have significant impact on the success and performance of the functional area and impacts organizational results 	<ul style="list-style-type: none"> • Oversees the day-to-day operations of a functional area and supports the implementation of organizational objectives • Researches and maintains sound industry knowledge within area of specialty to ensure organizational currency and competitiveness • Provides leadership and technical expertise • Develops and monitors operational and capital budgets
8 <ul style="list-style-type: none"> • <i>8 or more years of professional experience</i> • <i>Previous senior management experience</i> • <i>Bachelors, advanced degree and/or certification within professional specialty</i> 	<ul style="list-style-type: none"> • Applies professional expertise and a thorough understanding of the University's strategy and mission • Leverages the skills and knowledge of others 	<ul style="list-style-type: none"> • Work is guided by the broad goals and long-term objectives of the University • Exercises latitude in providing leadership and developing strategies that align with the mission of the University 	<ul style="list-style-type: none"> • Develops and executes long-term strategies within functional area to support the mission of the University • Contributes to the development and articulation of organizational priorities • May foster and develop significant external relationships and/or impact the public image of the University • Decisions and results have significant impact on the University's overall effectiveness and performance 	<ul style="list-style-type: none"> • Oversees the day-to-day operations of a functional area, setting strategies for that area and determining execution approaches • Directs the creation of programs to support organizational long-term objectives • Participates in steering committees and University-wide management teams to support executive decision-making and establishment of long-range plans



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Managerial Roles

<p style="text-align: center;">9</p> <ul style="list-style-type: none"> • 8 or more years of professional experience • Previous executive management experience • Bachelors, advanced degree and/or certification within professional specialty 	<ul style="list-style-type: none"> • Applies in-depth professional expertise, thorough understanding of the University’s strategy and mission, and recognized knowledge and understanding of academic environment and health care industry • Expertise in persuasion, influencing and developing strong relationships • Leverages the skills and knowledge of others 	<ul style="list-style-type: none"> • Work is guided by the strategic goals and long-term objectives of the University, with consideration to the future outlook and needs of the health care industry • Exercises latitude in providing leadership and developing strategies that align with and impact the mission of the University to ensure long-term success and viability 	<ul style="list-style-type: none"> • Develops and executes annual and long-term strategic objectives for a critical functional area with University-wide impact • Serves as a strategic advisor to the President and the Board of Regents • Develops and executes long-term strategies to further the mission of the University • Analyzes, develops and articulates organizational priorities • Regularly interacts and develops significant external relationships that impact the public image of the University as well as its financial stability • Decisions and results have significant impact on the University’s overall effectiveness, performance, and future viability 	<ul style="list-style-type: none"> • Executes annual and long-term strategic objectives for a critical functional area • Works with the Board of Regents to establish long-range objectives • Represents the organization to the external stakeholders and develops institutional relationships within the academic and healthcare community
<p style="text-align: center;">10</p> <ul style="list-style-type: none"> • 10 or more years of professional experience • Previous executive management experience • Bachelors, advanced degree and/or certification within professional specialty 	<ul style="list-style-type: none"> • Integrates professional expertise with in-depth experience to drive the development of novel and innovative approaches to providing education for the healthcare industry • Expertise in academic program management, design and implementation 	<ul style="list-style-type: none"> • Creates, develops and drives direction of the range of academic programs for the University <ul style="list-style-type: none"> – Responsible for the operations, programs and success of teaching and research, extension, admissions, registrar, and library activities. • Work is guided by the strategic goals and long-term objectives of the University, the future outlook and needs of the health care industry 	<ul style="list-style-type: none"> • Principle official responsible for all academic programs or financial officer of the University • Key influencer and strategic advisor to the president and board of regents • Provides link between academic and operational aspects of the University 	<ul style="list-style-type: none"> • Manages relationships and drives success across the University • Negotiations call for experienced communicator
<p style="text-align: center;">11</p> <ul style="list-style-type: none"> • 10 or more years of professional experience • Previous executive management experience • Bachelors, advanced degree and/or certification within professional specialty 	<ul style="list-style-type: none"> • Integrates professional expertise with in-depth experience to drive the development of novel and innovative approaches to providing education for the healthcare industry • Expertise in analysis and forecasting of the evolving nature of the education and healthcare 	<ul style="list-style-type: none"> • Creates, develops and drives long-term vision and strategies for the University <ul style="list-style-type: none"> – Guided by Board of Regents – Impacts future success of University • Analyzes and forecasts the nature of the education and healthcare community • Creates opportunities for growth and change 	<ul style="list-style-type: none"> • Principal administrative official responsible for the direction of all operations and successful execution of the University’s vision, mission, and strategy • Accountable for operating results of the University • Leverages significant external relationships that impact the public image of the University as well as its financial stability • Decisions and results drive the University’s overall effectiveness, performance, and future viability 	<ul style="list-style-type: none"> • Negotiates major issues, alliances and partnerships • Contact with key external partners, alumni, and the Board of Regents • Builds and cultivates key external relationships • Develops, enhances, and communicates the University’s vision, mission and strategy

