

HUMAN RESOURCES MEMORANDUM 19-011a		DATE ISSUED: 09/12/2019
SUBJECT: BLANKET POSITION APPROVAL PROCESS		REFERENCE: DOF BL 19-16; SAM 6518; Budget Control Section 31
TO: DGS Executive Team, Management Team, Managers, Supervisors and Employee Resource Liaisons		SUPERCEDES: HR Memo 18-013 and 19-004

PLEASE ENSURE THAT THIS INFORMATION IS SHARED WITH YOUR EMPLOYEES

Purpose

The purpose of this memorandum is to advise Department of General Services (DGS) programs of the policies and processes regarding the management and future approval of Blanket positions.

Authority

The authority directing this policy and process includes the [Budget Act of 2019 \(Assembly Bill 74\)](#), [Budget Control Section 31.00](#), the [State Administrative Manual \(SAM\) section 6518](#), and the Department of Finance (DOF) [Budget Letter 19-16](#).

Policy

The Temporary Help Blanket, known as the “Blanket,” is a budgetary tool that provides staffing flexibility to meet operational needs and allows departments to temporarily hire above the number of Total Authorized Positions, as displayed in the [Salaries and Wages Supplement \(Schedule 7A\)](#). To the extent the department can absorb the additional personnel costs, the Blanket can be used for temporary and intermittent staff, with the intent that if an employee is needed on a permanent basis, then a permanent position will be established through the budgetary process.

The Blanket may be used to fund the following position types:

- Permanent tenure positions
- Temporary help positions, such as:
 - Limited-Term tenure
 - Permanent
 - Seasonal
 - Student Assistants
 - Youth Aids
 - Retired Annuitants

The Blanket may be used to fund the following personnel-related expenditures:

- An employee retiring/running out unused, accrued leave credits;
- An employee on long-term leave;
- An employee exercising their mandatory reinstatement rights; and
- Retaining an employee for training purposes. This may be necessary to ensure continuity of operations when an employee in a key role leaves the department.

In order to convert existing Blanket positions to permanent coded position, DGS programs are required to work with the DGS Office of Fiscal Services – Budgets and Planning Unit (OFS) to complete the Budget Position Transparency (Budget Control Section 4.11) budget drill in September 2019. This process is outlined below in the Fiscal Year 2020-21 Budget Development and Position Approval Process section.

In order to establish a new position in the Blanket, DGS must request permission from DOF by submitting a Form 607: Change in Established Positions (607) package. Only DOF has the authority to approve a 607 request, and that position will only be approved through the remainder of the current fiscal year.

For a Blanket position to remain active beyond the remainder of the current fiscal year, the department must either:

- 1.) Submit a Budget Change Proposal (BCP); or
- 2.) Submit an extension request, including a detailed justification explaining the business need for a Blanket position, rather than a permanent, coded position. Extension requests should be limited as they require annual review by DOF and are rarely approved without a BCP.

All DGS programs must follow the Blanket Position Approval Process outlined in this memorandum to request a Blanket position. The exceptions to this requirement are outlined below in the Exceptions section.

Exceptions

The following position type requests are exceptions to the Blanket Position Approval Process and **do not** require DOF approval:

- Temporary help positions specified below:
 - Intermittent
 - Seasonal
 - Student Assistants
 - Youth Aids
 - Retired Annuitants
 - Although DGS programs do not need to complete the Blanket Position Approval Process, the program must follow the Retired Annuitant Request Process outlined in the [Personnel Operations Manual: Retired Annuitants](#).

The following personnel-related expenditures are exceptions to the Blanket Position Approval Process and **do not** require DOF approval:

- An employee retiring and/or running out unused, accrued leave credits;
- An employee on long-term leave; and
- An employee exercising their mandatory reinstatement rights.

Blanket Position Approval Process

All DGS programs requesting a Blanket position are required to follow the process below:

1. The DGS program's Employee Resource Liaison (ERL) will submit a Request for Personnel Action (RPA) Budget Approval [DGS OHR 37](#) to the program's [assigned Budget Analyst](#) for approval. If approved, continue to step 2.
2. The ERL will assist the program's management in writing a comprehensive RPA Justification Memorandum. This memorandum describes the request, background, classification considerations, the program's business need for the Blanket position, and any consequences related to the denial of the request.

To adequately describe the business need, the requesting DGS program must include:

- Any approved or upcoming BCP, if the position is needed beyond the end of the current fiscal year,
- A description of any changes to the program's workload or customer base,
- Workload metrics data, and/or

- Any challenges the program is facing that would be addressed by this position.
3. The ERL will submit the RPA with all required documents, including the approved DGS OHR 37 and the Justification Memorandum, via the SharePoint Tracker to the Office of Human Resources (OHR's) Classification and Pay Unit.
 4. OHR will review the submitted package and submit the RPA package to the Personnel Transactions Unit (PTU) Position Control Specialist. If OHR returns the RPA to request additional information, the ERL is expected to reply promptly.
 5. If the request is approved, PTU will prepare the Form 607 Package for submission to the OFS.

OHR has ten (10) calendar days to complete Step 4 and 5 collectively. The Classification and Pay Analyst has seven (7) calendar days, the Classification and Pay Manager has two (2) calendar days, and PTU has one (1) calendar day to complete this step.

6. OFS will review the Form 607 Packages and send it to DOF for their review and determination. OFS has two (2) calendar days to complete this step.
7. DOF has up to thirty (30) *business* days to review the package and make a determination.
8. If approved by DOF, then OFS will record the decision in SharePoint RPA Tracker and move the RPA forward to initiate advertisement of the position. OFS has one (1) day to complete this step.
9. OHR will advertise the position. OHR has one (1) day to complete this step.
10. The Hiring Phase will commence. Program has thirty (30) calendar days to complete this step.

Fiscal Year 2020-21 Budget Development and Position Approval Process

As part of the 2020-21 budget development process, DGS programs are required to complete an inventory of current Blanket positions and submit this to OFS. OFS will, in collaboration with DOF, convert these existing Blanket positions to permanent, coded positions as part of the Budget Position Transparency (Control Section 4.11) budget drill. This adjustment will increase the number of authorized positions to account for the currently approved, permanent positions in the Blanket, but will not increase expenditure authority for these positions. In addition to providing more transparency, converting Blanket positions to authorized positions will allow DGS to receive accurate funding augmentations for employee compensation and retirement adjustments, which is not provided for Blanket positions.

Following this drill, Blanket position requests for new workload will be reviewed and approved by DOF as part of DGS' RPA process. For permanent/ongoing workload needs, the requesting DGS program will complete a BCP to ask for the related permanent coded position.

Questions

If you have additional questions, please contact your assigned OHR Classification and Pay Analyst.

ESTELA GONZALES, Chief
Office of Human Resources

EG:jjg