







HR Generalist Competencies

Core HR Expertise and Compliance

	 <p>Relational</p>	 <p>Functional</p>	 <p>Conceptual</p>
HRG 2, 3/Sup 1, HRG 4/Sup 2, HRG 5/Manager 1	<p><b>Responds</b> to basic inquiries about HR matters and processes, and refers to relevant campus and information resources as needed</p> <p><b>Asks questions</b> and accurately documents conversations in order to refer to relevant HR specialists</p> <p><b>Identifies</b> and escalates problems related to HR transactions</p>	<p><b>Maintains employee privacy and confidentiality</b> in all matters relating to personal information</p> <p><b>Complies</b> with PPSM policies, labor contracts, and work rules affecting employment in union and non-union environments; knows when and where to <b>escalate</b></p> <p><b>Researches and summarizes</b> pertinent facts and information needed to support HR case review</p> <p><b>Follows protocol on correct documentation</b> and maintenance of personnel files</p> <p><b>Follows basic legal and compliance requirements</b> for submission of leave documentation, certifications, notice obligations, and employee privacy</p>	<p>Understands <b>basic laws and regulations</b> related to recruitment, hiring, and onboarding paperwork</p> <p>Understands <b>contract and policy provisions</b> for basic <b>timekeeping and pay questions</b></p> <p>Understands <b>benefits eligibility and related benefits packages</b>; refers to HR benefits specialists as needed</p> <p>Understands how the <b>correct use of HCM and related systems</b> impacts HR data integrity</p> <p>Understands <b>types of visas and related policies; researches and interprets visa regulations and policies</b>; refers to appropriate experts for additional guidance</p> <p>Understands <b>basic components of the performance management cycle</b> and review process, including current review forms for represented and non-represented employees</p> <p>Understands the <b>fundamentals of Academic Personnel Manual (APM)</b> and academic labor contracts</p>
HRG 3/Sup 1, HRG 4/Sup 2, HRG 5/Manager 1	<p><b>Responds</b> to performance issues and <b>provides guidance</b> on preparation of clear and concise performance documents, i.e., annual reviews, PIPs and disciplinary actions</p> <p><b>Collaborates</b> with managers and Central HR Compensation on job reclassifications and writing of job descriptions</p> <p><b>Consults</b> with employees on HR related issues and employee rights, and refers to appropriate HR specialists and campus resources</p> <p><b>Asks appropriate questions and engages</b> in initial fact-finding on HR issues, including cases related to discrimination and sexual harassment, and <b>escalates to appropriate office</b> such as Central HR and/or Office for the Prevention of Harassment and Discrimination (OPHD)</p>	<p><b>Interprets and applies</b> nuances of applicable policies and labor contracts, federal and state laws and regulations, and organizational policies and procedures; knows when and where to escalate</p> <p>In collaboration with client units and Central HR, <b>prepares</b> separation and layoff letters and notices, assists with documentation related to disciplinary action and termination, and other personnel action letters, pursuant to policy and contracts; seeks appropriate approvals before advising on unit actions</p> <p><b>Collects supporting documents</b> for personnel action communications and drafts near final communication to employees for managers</p> <p>At S1 level, provides immediate supervision to operational/technical HR employees</p>	<p>Understands the <b>compensation framework of job families, job levels and expectations, salary ranges/pay grades</b>, and differences in represented vs. non-represented positions</p> <p>Understands the steps to <b>progressive discipline and employee rights</b>, and provides guidance on implementation; refers to HR specialists as needed</p> <p>Understands <b>actions related to occupational and non-occupational disabilities</b>, transitional return-to-work, reasonable accommodation; refers to Disability Management Services</p>
HRG 5/Manager 1	Serves on and off campus as <b>recognized functional expert</b>	<b>Sets standards</b> of performance, measures the quality and effectiveness of HR services, and recommends ways to improve processes and services	Understands how to <b>use the compensation framework</b> in establishing cost-effective organizational structures

HR Generalist




## HR Generalist: Business Acumen and Analysis

	 <b>Relational</b>	 <b>Functional</b>	 <b>Conceptual</b>
(HRG 2, 3/Sup 1, HRG 4/Sup 2, HRG 5/Manager 1)	<b>Understands the client unit's strategic priorities</b> and how the unit contributes to Berkeley	Uses <b>job-related systems</b> for operations, reporting, and analysis, e.g., HCM, BAIRS, PageCenter, CalTime, Service Now, Cal Answers	Understands <b>basics of position control</b>
(HRG 3/Sup 1, HRG 4/Sup 2, HRG 5/Manager 1)	<p><b>Understands the organizational, cultural and political landscape</b> that is impacting Berkeley and the client unit</p> <p><b>Understands the complex campus landscape and navigates across</b> departments to accomplish unit objectives</p> <p><b>Remains current about business challenges</b> and opportunities facing the client</p>	<p><b>Prepares analytical recommendations</b> for leadership, e.g., cost benefit analysis</p> <p><b>Identifies how internal HR actions</b> may be impeding good process and service, and presents and recommends solutions for review</p> <p><b>Identifies ways to balance the needs of employees</b> with the needs of the unit/organization</p> <p><b>Analyzes data and writes clear arguments</b> for personnel cases</p>	<p><b>Uses knowledge of competitor organizations and HR trends to recommend changes to improve organizational effectiveness</b></p> <p>Understands <b>budgetary impact</b> of HR decisions</p> <p>Understands the array of <b>factors and conditions that influence position management decisions</b></p>
(HRG 5/Manager 1) At M1 level, manages subordinate HR supervisors and professionals to achieve organizational objectives and administration of personnel policies, programs, and procedures		<p>Acts as a <b>technical expert in providing HR solutions</b> that can enhance the organization and mitigate financial and legal risk for the organization</p> <p>Uses <b>performance metrics</b> to demonstrate the impact of HR practices on unit goals and strategies</p> <p><b>Determines and approves costs of business activity</b> for their own project initiatives</p>	Understands <b>how economic factors impact higher education</b> and Berkeley operations specifically

## HR Generalist: Workforce and Talent Planning

<p><b>Helps managers assess</b> talent gaps and recommends learning opportunities to bridge gaps</p> <p><b>Advises and assists clients</b> on individual and unit development plans</p> <p><b>Advises</b> on talent development needs and career plans to maximize potential</p> <p><b>Collaborates</b> with campus leaders on staffing issues that may impact significant business performance cross-functionally or across the entire organization</p>	<p><b>Designs</b> succession planning and talent development strategies</p> <p><b>Analyzes</b> staffing requirements across the organization and recommends ways to optimize the existing workforce</p> <p><b>Identifies</b> organizational and individual capabilities needed to achieve successful business outcomes within the client unit</p> <p><b>Assesses</b> positions and competencies/skills in the current organization against organizational goals</p> <p><b>Identifies</b> capability gaps within the HR function and develops solutions</p>	<p>Understands <b>succession planning models</b> and works with unit business leaders to identify a pipeline of potential successors for key positions</p> <p>Understands <b>fair and equitable recruitment practices and hiring</b> decisions to ensure a diverse candidate pool</p>
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## HR Generalist: Organizational Development and Consulting

	 <b>Relational</b>	 <b>Functional</b>	 <b>Conceptual</b>
HRG 3/Sup 1	<p><b>Participates</b> in unit business meetings in an advisory capacity Works with key stakeholders to build consensus and drive positive outcomes</p> <p><b>Consults</b> with clients regarding business risks of HR actions and recommends effective solutions</p>	<p><b>Assists with change management plans and communication</b></p> <p><b>Identifies inefficiencies</b> and recommends process improvements</p>	
HRG 4/Sup 2	<p><b>Advises</b> on organizational development strategies to promote retention, engagement and increased productivity</p> <p><b>Initiates change</b> by building a business case, overcoming resistance, engaging key stakeholders, and articulating key decisions</p>	<p><b>Implements change management</b> plans to address business problems and talent needs</p> <p>Proactively assesses organizational issues and recommends solutions</p>	
<p>HRG 5/Manager 1</p> <p>At M1 level, manages subordinate HR supervisors and professionals to achieve organizational objectives and administration of personnel policies, programs, and procedures</p>	<p><b>Provides direction</b> on decisions that have wide scope and impact for the unit or organization</p> <p><b>Consults</b> with campus leaders on cross-departmental implementations; evaluates financial impact and recommends actions</p>	<p><b>Sustains change</b> by ensuring resources, structures, communication and continual learning is in place</p> <p><b>Leads and directs</b> critical campus projects requiring functional integration across the organization</p> <p><b>Designs and develops</b> organizational development strategies, including organizational structure changes, to promote retention, engagement, and increased productivity</p>	