

About the Document

name	OP-MGR-2435-M. Position Justification Form
owner	Finance
access & use	Restricted to Managers & HR
what it is	<p>A form that when completed, creates a business case for justifying the future budget or current opening of a new position.</p> <p>Used for:</p> <ul style="list-style-type: none"> ◆ Obtaining approvals for opening a new position that does not currently exist – or was not included in this year’s budget ◆ Justifying requests for additional headcount for the next fiscal period, as part of planning and budgeting periods ◆ Ensuring that approvals are obtained before proceeding with recruiting or before the department makes plans and counts on a future hire.
who uses it	<ul style="list-style-type: none"> ◆ The Hiring Manager completes the form that will be reviewed for approval as part of annual headcount forecasting and creating next period’s budget. ◆ The Hiring Manager completes the form when the request for the search to begin relates to a position that’s not currently included in the budget
used with	<ul style="list-style-type: none"> ◆ <i>OP-MGR-2430-M. Approval to Hire Form</i>
<p>Caution: These instructions and the accompanying form include sensitive information. They should not be shared with staff members who do not have responsibility for direct reports. Use caution and discretion when using, as even blank documents may be misunderstood without context.</p>	

Why This Process is Important

We recognize that this form involves some calculations and will take some time to complete, but this exercise is not optional. Here’s why:

- ◆ Before adding a new position to our budget, we need to justify the significant additional expense. Increasing headcount is an important and expensive decision that can only be funded with anticipated increased productivity, expense reduction, and/or additional revenues.

- ◆ Without clarity, we may add a new position for the wrong reasons. For example, we may believe a new position is necessary because of a temporary period of high work volume and pressure, but if the work volume doesn't continue, the position won't be sustainable.
- ◆ By answering some fundamental questions, the answers create a business case that helps us determine if adding the new position will provide return on investment, and when.

Working with the Document

- ◆ Gray shaded form fields are input placeholders. To replace the text in these form fields, click **ONCE** on the field and type your new content.
- ◆ To insert a check inside a check box, double-click on the check box and under the **Default value** heading, select **Checked**.
- ◆ Table cells will expand to accommodate any length of text.
- ◆ If required, you can copy and paste to add additional tables to the form. In the upper-left corner of the table, click the  Table icon to select the entire table, and then press **Ctrl + C** to copy it. Right-click in the destination location and press **Ctrl + V** (or right-click and select **Keep Original Table Formatting** from the **Paste Options**).
- ◆ If required, you can copy and paste to add additional rows to the tables. Place the cursor in a row, right-click, and select **Insert > Insert Rows Below**. Or, to copy and paste a row, select the entire row and press **Ctrl + C**, then place cursor in the first cell of the destination row and press **Ctrl + V**.

Instructions

1. Save a copy of the form to a restricted working folder.
2. Answer the questions and provide the information requested, following the instructions given in the form.
3. Obtain approval signatures.
4. Once the form is approved, you can begin the recruiting process.