

SAN DIEGO UNIFIED SCHOOL DISTRICT

Date: August 23, 2016

To: All Division Heads, Department Managers, Supervisors and Site Administrators

Subject: **CHANGES TO THE RECLASSIFICATION PROCESS FOR CLASSIFIED EMPLOYEES**

Department and/or Persons Concerned: All Classified Employees and their immediate supervisors

Due Date: October 15, 2016

Reference: See Revised Administrative Procedure No. 7540

Action Requested: Distribute the Letter to All Classified Employees, Supervisors and Managers. Review any requests for reclassifications submitted by employees and return to the employee within 5 days of receipt.

Brief Explanation:

The Human Resource Services Division, The Administrators Association of San Diego, The Police Officers Association and all three Chapters of the California School Employees Association have created a joint labor-management Reclassification Committee. The Committee's role is to accept, review and make recommendations to the Superintendent for requests for classification review; the committee consists of one representative from each classified bargaining unit and an equal number of District representatives.

The Reclassification Committee has elected to review all requests for position classification review submitted during the 2014-15 and 2015-16 school years. As part of this process, employees who submitted a request for review during this time frame or during the window for the 2016-17 school year will be interviewed by two members of the committee. The allotted time for these interviews is 30 minutes. Employees shall be allowed to participate. Employees who submitted a request as part of a group, will be asked to select 2-3 members who will speak for and represent the interests of the larger group. Employees will receive a letter with the date and time of their interview; a copy of this letter will also be sent to the supervisor.

Changes to the Procedure-

As part of the creation of this new committee, Administrative Procedure 7540-*Classification of Classified Staff Positions and Position Classification: What's it all about?* have been revised; these documents can be found on our website. <https://www.sandi.net/staff/human-resources/reclassification-information>.

You should be aware of the following changes to this procedure:

- All Requests for Classification Review are reviewed by the Committee. The HR Division no longer processes these reviews alone.
- Recommendations for reclassification are made by the Committee.
- Employees must submit their requests for reclassification to their supervisors by **October 15** during the annual cycle.
 - The supervisor will review and return the signed document to the employee within five (5) work days after receiving the document so that the employee can turn the form in by the October 31st deadline.

- The supervisor will obtain the signature of the Principal/ Department/ Division Head. If the Principal is the immediate supervisor, it does not need to be submitted to the Area Superintendent. Copies of the document should be provided by the supervisor to their chain of command as needed.
- If the document is not returned to the employee within the five (5) workdays, the employee may submit the document to the Human Resource Services Division.
- Employees who submit a request for position classification review will be interviewed; employees shall be allowed to participate in the interview. Employees who request a review as part of a group, will be asked to select 2-3 members who will speak for and represent the interests of the larger group.
- There is one opportunity to appeal. Appeals are heard by the full committee and the employee or group must submit a new/additional information beyond the original submission.

As a manager, supervisor or site administrator, it is important that you understand the position descriptions of all of your employees and ensure that the duties assigned to them are reasonably related to the duties identified within the position description.

Criteria for Reclassification-

“Reclassification” means the upgrading of a position to a higher classification as a result of the gradual increase of the duties being performed by the incumbent in such position (Ed Code 45101).

Criteria for reclassification	Criteria not relevant to reclassification
<ul style="list-style-type: none"> • Gradual increase in duties • Change in duties that are <ul style="list-style-type: none"> ○ significant ○ required by the District ○ permanent ○ require a skill level or responsibility level higher than usually required in the classification • Level of responsibility or type of work changed nature of job • Significant change in skill level, decision-making and/or responsibility • Significant change in authority, autonomy or independence of action, including changes in degree of supervision received • Significant change in complexity of the position--complexity of problem, special or unique skills, depth of knowledge and experience required • Significant change in consequence of errors • Significant change in scope of work--variety of functions assigned, or degree of coordination of diverse activities • Additional certificates or education required • Extent of change (percentage of job) 	<ul style="list-style-type: none"> • Additional duties of the <i>same kind</i> designated in the classification or position description • Change in workload that is of the <i>same nature and level of complexity</i> • Changes insignificant in a single area or overall. For example, if new function is found to only be 10% of the overall duties of the position • Technological changes or tools (e.g. new software) that <i>do not substantially alter the essential functions</i> of the job, particularly if the industry is similarly changing to the new technology • Personality of incumbent • Skill level of incumbent • Educational attainment of incumbent • Knowledge, skills, and abilities possessed by the incumbent which are <i>not required or regularly used</i> in the position • Incumbent’s knowledge • Incumbent’s ability • Quality of work done • Length of dedicated service in position • Outstanding performance record • Retention--match a competitive promotion or job offer • Financial need • Obtain a salary increase • Job stress • Anticipated future changes

Understanding the reclassification process-

Classification, reclassification, salary level, workload and performance are often confused by employees, managers and the public. Employees, of all levels, often believe that submission of this form will provide them with a resolution to a question or concern they might have related to their salary, workload or performance, but these issues are not addressed through the classification review process. The classification review process is solely to determine if an employee is performing a higher level of work. We provide the following questions for your consideration to assist in your understanding of request for position classification review.

If the employee's primary purpose in completing this form is aligned to one of these statements...

- My duties over the years have significantly changed. These changes have required that I take on greater responsibility or have to use a higher level of skills.
- I now serve as the lead person in my department (District designated).
- The complexity of my job has increased and is no longer entry level.
- The duties that have been added to my job require that the minimum requirements, training and skills be changed in the position description.

... then requesting that the position be reviewed may be a way to have these concerns addressed. Please note, that the mere completion of the form, does not entitle an employee to be reclassified. The interview and review of documents are completed to determine if there has been a gradual accretion of higher level duties.

If the employee's primary purpose in completing the form is aligned to one of these statements...

- I see someone else in [job title] paid more than I am, and I don't think it is fair.
- Other jobs in the District have received equity adjustments, but I haven't and I don't think it is fair. It creates an imbalance in the salaries.
- The District doesn't pay me enough for what I do.
- I think there should be more of a difference between my salary and someone else's in my general career series.
- People in other districts make more than I do for the same job.

... then requesting that the position be reviewed is most likely not the best venue for these concerns. These questions are about salary and compensation and are addressed through a District or series- wide compensation study. Compensation studies are performed on a regular basis by the Human Resource Services Division and are then negotiated with the appropriate bargaining unit.

If the employee's primary purpose in completing the form is aligned to one of these statements...

- I have received duties from other classifications and I can't get everything done in 8 hours.
- Some of the duties I am doing are because positions were eliminated. I think I should get more money to compensate for the new duties.
- The State has required more regulations so it takes me longer to do my job than it did before.
- I am under great stress to do my job. There is more to do (phone calls, complaints, etc.).
- I have been assigned the work of underperforming colleagues to ensure the work is completed to ensure the work is complete in my office.

... then requesting that the position be reviewed is most likely not the best venue for these concerns. These questions are about workload and are addressed through a discussion between the employee and supervisor. Using the official position description, the focus of this conversation should be to work with together to prioritize your duties; supervisors could also consider add more/ different types of staff or to provide recommendations to the HR Division regarding updates to the current position description.

If the employee's primary purpose in completing this form is aligned to one of these statements...

- I work very hard and deserve a raise.
- I have a lot of skills and talents and have saved the District a lot of money over the years.
- My supervisor tells me I am an outstanding employee and should be better paid.

... then requesting that the position be reviewed is most likely not the best venue for these concerns. These questions are about performance and are addressed through a discussion with the employee and supervisor and are seen in good reviews or promotion to another position.

If you have any questions, please contact Acacia Thede, Executive Director, Human Resources, athede@sandi.net.

APPROVED:



Tim Asfazardour
Chief Human Resources Officer
Human Resources Services Division

TA:at

Attachments: (3)



Reclassification Committee
Human Resource Services Division
Fax- 619 725-8074
jobs@sandi.net

Date: August 22, 2016 Attachment 1
To: All Classified Employees
All Management, Supervisors and Site Administrators
From: Reclassification Committee
RE: Revised Reclassification Process

The Human Resource Services Division, The Administrators Association of San Diego, The Police Officers Association and all three Chapters of the California School Employees Association have created a joint labor-management Reclassification Committee. The Committee's role is to accept, review and make recommendations to the Superintendent for requests for classification review; the committee consists of one representative from each classified bargaining unit and an equal number of District representatives.

As part of the creation of this new committee, Administrative Procedure 7540-*Classification of Classified Staff Positions* and *Position Classification: What's it all about?* have been revised; these documents can be found on our website. You should be aware of the following changes to this procedure:

- All Requests for Classification Review are reviewed by the Committee. The HR Division no longer processes these reviews alone.
- Recommendations for reclassification are made by the Committee.
- Employees must submit their requests for reclassification to their supervisors by October 15 during the annual cycle.
 - The supervisor will review and return the signed document to the employee within five (5) work days after receiving the document.
 - The supervisor will obtain the signature of the Principal/ Department/ Division Head. If the Principal is the immediate supervisor, it does not need to be submitted to the Area Superintendent. Copies of the document should be provided by the supervisor to their chain of command as needed.
 - If the document is not returned to the employee within the five (5) workdays, the employee may submit the document to the Human Resource Services Division.
- Employees who submit a request for position classification review will be interviewed; employees shall be allowed to participate in the interview. Employees who request a review as part of a group, will be asked to select 2-3 members who will speak for and represent the interests of the larger group.
- There is one appeal. Appeals are heard by the full committee.

Administrative Circular No. NUMBER provides detailed information about this process. If you have not done so, you may also want to review Administrative Procedure 7540-*Classification of Classified Staff Positions* including the attachment *Position Classification: What's it all about?* These documents can be found on our website <https://www.sandi.net/staff/human-resources/reclassification-information>

Inquiries should be addressed to the Reclassification Committee. Written inquiries can be sent via school mail to the Human Resource Services Division or email to jobs@sandi.net.

**SAN DIEGO UNIFIED SCHOOL DISTRICT
Reclassification Committee
Human Resource Services Division**

POSITION CLASSIFICATION:

WHAT'S IT ALL ABOUT?

July 2016

FOREWARD

This publication has been prepared by the Human Resource Services Division for the purpose of answering the most frequently asked questions about position classification in the San Diego Unified School District's Classified Service. The purpose is to provide information to administrators, supervisors, and employees so that they may better understand the nature of position classification and the role of the Human Resource Services Division in maintaining the job classification plan.

The reader is invited to contact the Human Resource Services Division for further information if there are questions regarding position classification which are not answered in this handbook.

References:

District Procedure Number 7540

California Education Code 45101

1. Q: **What is job classification all about?**

A: Classification is a plan for systematically bringing similar things together into groups based on some factor common to each and for distinguishing the groups from each other. For example, in storekeeping, stock is sorted and classified, and the classification process can be used to distinguish items for the purpose of ordering, receiving, issuing, and inventorying. In merchandising it is one of the most important factors in "pricing" the goods.

2. Q: **What is position classification?**

A: Position classification first involves the sorting of positions into broad occupational categories.

Examples: Engineer, Clerk, Secretary

Each position within these general categories is then placed in another narrower category, which more specifically describes the work.

Examples: Civil Engineer, Structural Engineer, Electrical Engineer, Mechanical Engineer.

Within these more specific categories, positions are then ranked according to the level of difficulty and responsibility.

Examples: Civil Engineer, Senior Civil Engineer, Supervising Civil Engineer.

3. Q: **How does the position-classification plan differ from the salary plan?**

A. The position-classification plan categorizes and ranks positions into different occupational groups and levels. The salary plan establishes rates of pay for different kinds and levels of work based upon Board of Education policy and the principle that classified employees should be paid substantially the same rates of pay found to be generally "prevailing" in other similar agencies for the same or similar types of duties. Appropriate internal pay relationships or dollar differences between related job classes may then be established to reflect the similarities or differences in the duties and responsibilities of those job classes.

4. Q: **Why have a position-classification plan?**

A: The district is required to maintain a position classification system as required by Education Code. The basic purpose of a position classification plan is to maintain a logical and consistent relationship among different kinds of jobs, job requirements, and the salaries paid. The plan provides a systematic basis for assigning standard titles to jobs according to the kind and level of work performed and then for fixing rates of pay. It serves as a starting point in bringing together the worker and the job through determination of the qualifications necessary to perform the work. Inquiries into the suitability of an applicant may then be made by examination. The plan thus serves as a foundation for organizational planning, wage and salary administration, budgetary planning and development, and employee recruitment and selection activities.

5. Q: **What are some of the basic terms used in position classification?**

A: A **position** is defined as a group of duties and responsibilities assigned by official authority and requiring the full- or part-time employment of one person.

A **job class** is defined as a group of positions which have duties and responsibilities sufficiently similar (but not necessarily identical) that:

- a. The same descriptive title can be applied.
- b. The same requirements of education, experience, knowledge, skills, and abilities and the same tests of fitness (examinations) may be used in qualifying employees and establishing eligible lists.
- c. The same rates of pay can be applied with reasonable equity to all positions in the job class.

A **position description** is an official statement of the characteristics of a class of positions. The description is composed of several parts including a definition of the job class, a list of typical duties assigned to positions in the job class, and the qualifications required which determine who is eligible to compete in an examination for the class. (Copies of official position descriptions may be obtained from the Human Resource Services Division or via the district's web site).

6. Q: **Who is responsible for classifying positions in the classified services?**

A: This responsibility belongs to the Board of Education. The Board of Education has delegated the authority to classify positions to the Superintendent, who in turn has delegated this responsibility to the Human Resource Services Division.

7. Q: **What is the Reclassification Committee?**

A: The Reclassification Committee is a joint labor management committee that consists of 5 District Representatives plus 5 representatives, 1 from each classified bargaining unit for a total of 10 members. The purpose of this committee is to accept, review and make recommendations to the Superintendent for all requests for reclassification.

8. Q: **Who is responsible for determining the organization of each school or office, the number of positions, and the duties and responsibilities to be assigned to each classified position?**

A: The Education Code assigns these responsibilities to the Board of Education. The Board, in most cases, has delegated the authority to assign duties to the Superintendent who, in turn has delegated this responsibility and authority to the division heads. Department heads, school principals and supervisors have been delegated the authority to assign duties and responsibilities.

9. Q: **When are classification reviews conducted?**

A: There are four primary reasons for initiating a classification review.

1. Classification reviews may be conducted when a new position has been created. A new position must be classified before an employee can be hired to fill it.
2. Existing positions may be reviewed because of a gradual accretion of duties.
3. Studies may be initiated by the Human Resources staff, due to changing trends in classifying related positions.
4. Classification reviews are frequently initiated for vacant positions.

Classification reviews are conducted by two members of the Reclassification Committee. The 2 members of the committees, referred to as “teams” include 1 Human Resource Analyst and 1 employee selected by the bargaining unit.

10. Q: **How are classification studies of existing positions initiated?**

A: A classification review usually begins when an employee or division/department head requests that a position be reviewed. The employee in the position prepares a request for a Position Classification Review form; part of the form must be filled out by the employee's supervisor. This form contains spaces for identifying the position and for listing the officially assigned duties. The presentation is best composed of a series of statements succinctly stating the duties performed outside of the position description. The form requires the signature of the employee and the immediate supervisor. The form is then forwarded to the Human Resource Services Division, Reclassification Committee. Request for position classification review will only be accepted during the window period, September 1 – October 31.

11. Q: **May an employee or an employee organization initiate a classification study?**

A: Yes. An employee or the employee organization may request a review of a classification. The Reclassification Committee requires the completion of position classification review forms when classification reviews are initiated by employees or employee organizations.

12. Q: **How is a classification study conducted?**

A: After receipt of the request for Position Classification Review form, members of the Reclassification Committee are assigned the classification review. The team typically interviews the incumbent and discusses the duties and responsibilities with him/her and the supervisors and may observe work procedures. The team may also find it desirable to study related positions at the same time in order to make meaningful comparisons. The team evaluates the position in terms of a number of different classification factors, which may include:

- a. Mental requirements (including complexity or difficulty of work).
- b. Skill requirements (including complexity of equipment operated or maintained, difficulty of tasks performed).
- c. Independence of judgment and action required (freedom to act, consequences of error).
- d. Extent and difficulty level of contacts with others (including consideration of tact, discretion, confidentiality, persuasive ability, and the effect of contacts on the work of the unit and the school system).
- e. Kind and scope of supervision exercised (size of organizational unit, full or partial supervisory responsibility).

Upon completion of this review, the team and presents this recommendation to the full Reclassification Committee. The committee reviews and considers the recommendation to determine if the recommendation from the team meets the requirements of reclassification. The committee votes on all recommendations made by the team. Decisions are then communicated to the incumbents, supervisors and the bargaining units in writing.

13. Q: **Can the board of education overrule the classification finding of the human resource services division?**

A: Yes. The Board could also require changes in the duties and responsibilities of the position or class of positions studied so that a subsequent classification review might be required.

14. Q: **How long does it take to complete a classification review after approved classification request forms are received by the Human Resource Services Division?**
- A: The amount of time varies with the number of positions to be reviewed, the difficulties involved in auditing and evaluating positions, the number of contacts that need to be made, and the current workload and priorities of this work.
15. Q: **When are the employees and supervisors notified of the classification decisions?**
- A: Usually notification is sent to the employee's supervisor shortly after the decision has been made. The effective date of reclassification will be retroactive to the date that the employee began performing the higher level new duties, but will not be prior to July 1 of the fiscal year that the Request for Position Classification Review form was received and time stamped in the Human Resources Division.
16. Q: **In a review of a whole class with many positions, will the team visit each incumbent in the class?**
- A: No. This is usually not necessary because several incumbents may perform nearly identical functions. If a large class is to be studied, the team uses a sampling technique to assure that a representative sample of the entire group is obtained and that different kinds of positions within the class are reviewed. Operating departments and/or employee organizations may also be invited to suggest particular positions which should be audited.
17. Q: **In completing a Request for Position Classification Review form, should a position description be copied into the form?**
- A: No. A position description is usually intended as a more general description of the entire job class, and not any particular position within the job class. Merely copying the position description on the review form would not provide any new useful information relating to the duties and responsibilities of the position to be studied. A duties statement is needed to determine if the position is similar to or significantly different from other positions in the same class.
18. Q: **What factors should an employee remember when describing assigned duties?**
- A: Describe the duties and responsibilities of the position accurately. Be brief, but list all important facts. Indicate what work is done, when, how, and why it is done. Remember that it's the regular functions of the job that you are writing about and not your personal capabilities or qualifications.

19. Q: **What should be avoided when describing assigned duties?**
- A: Avoid words that are ambiguous or susceptible to being interpreted in various ways such as “assist,” “participate,” “handle,” and “process.” (For example, the statement “I receive, open, and timestamp incoming mail” is much more precise and descriptive than “I process incoming mail.”)
20. Q: **When may requests for classification review be submitted?**
- A: Requests for position classification review will only be accepted during the window period, September 1 – October 31.
21. Q: **Is a heavy increase in the volume of work a basis for requesting classification review of a position?**
- A: No. If the work in any particular job increases in volume, additional work-hours in the budget should be requested by the department head; or the work should be reorganized and reassigned if the volume cannot be completed within the regularly assigned work schedules.
22. Q: **Do the skills and personal qualities of the incumbent affect the classification of the position?**
- A: No; at least not directly. Position classification is primarily concerned with the kind of work assigned and performed along with the level of difficulty and responsibility the work requires. Neither performance nor the special abilities or personal qualifications of the incumbent are considered in determining the proper job class. In some cases it may be found that a job has changed over a period of time and additional duties and responsibilities have been assigned by the supervisor or department head. In such a case, the employee's qualifications may have permitted the administrator to make changes in the job; however, it is the job itself and not the qualifications of the employee which determine the classification.
23. Q: **Does having a position classification plan cure personnel problems?**
- A: No. The most accurate and equitable position classification decisions cannot make up for poor supervision, inefficient performance, inadequate training, or for poor or improper organization. Neither is it designed for rewarding length of time on the job, paying for qualifications not used, nor recognizing unusually meritorious performance or efficiency on the job. These are more appropriately recognized in the employee evaluation process.

24. Q: **If position classification is not concerned with the individual abilities of incumbents, but with the duties of the position to which the incumbent is assigned, how may an unusually well-qualified or hardworking incumbent be rewarded?**
- A: Through oral and written recognition or praise from supervisors, through good performance evaluations and notices of outstanding service, and, most importantly, through increased opportunity for promotion to better paid and more responsible jobs.
25. Q: **Should poor performance be the basis for classification of a position?**
- A: No. Employee performance is evaluated by the incumbent's supervisor and the principal/department head. If an employee appears incapable of performing the duties and responsibilities of the position, the employee should be advised to undertake additional training or obtain counseling in whatever is required for satisfactory performance. Disciplinary action should be considered by the supervisor if this does not produce the required results.
26. Q: **Does an employee have a right to refuse to do work that is not listed in the position description for his class?**
- A: No. It is insubordination for an employee to refuse a work assignment which he/she is capable of performing. The position description is intended to describe duties typical of a class of positions, rather than of each individual position in the class. It obviously cannot be a complete inventory of each and every specific duty and therefore, the position description does not restrict supervisors from assigning other duties. The phrase "performs related duties" which is found in the ~~typical~~ duties section of each position description is placed there in recognition of this. As long as the specific duties and responsibilities are reasonably consistent with the job class, the assignment should be carried out without question. There are provisions for temporary promotions to jobs of higher level when the higher level responsibilities continue for periods of more than four workdays in any 15 calendar-day period.
27. Q: **Does the number of employees supervised affect the classification of the supervisor's position?**
- A: The number of individuals supervised, while important, is usually not as important as is the difficulty and responsibility of the supervisor's entire range of duties. Supervisory responsibility is only one of several important evaluation factors.

28. Q: **Does the organizational level of a supervisor or administrator in the school system automatically determine the classification of the support position?**

A: No. While the organizational level affects the duties and responsibilities of a supervisor or administrator, and may thereby affect the natural assignment and level of duties of the support position, the classification of a support position is determined by the duties and responsibilities actually delegated and performed. A support person whose supervisor does not delegate significant duties and responsibilities to his/her position may be in a lower job class than support persons assigned to other administrators who are at the same level.

29. Q: **If I do not agree with the decision, what is the appeal process?**

A: An employee, supervisor, department head, division head, or employee organization exclusive representative may appeal the classification results in writing to the Reclassification Committee within thirty (30) calendar days of notification in writing from of the results of the classification review. The Reclassification Committee will interview and respond in writing to the appeal within forty five (45) calendar days of the meeting.



San Diego Unified
SCHOOL DISTRICT

ADMINISTRATIVE PROCEDURE

CATEGORY: **Personnel, Classified Staff**
SUBJECT: **Classification of Classified Staff Positions**

NO: 7540
PAGE: 1 OF 6
EFFECTIVE: 1-29-62
REVISED: 8-10-16

A. PURPOSE AND SCOPE

1. To outline administrative procedures governing the process of classification of classified positions other than classified management positions.
2. **Related Procedures:**

Placement of custodians	7410
Secretarial/clerical allocation formula for regular program school sites	7412
Classification of management salary schedule positions	7610

B. LEGAL AND POLICY BASIS

1. **Reference:** Board policies I-5000, I-5500, and I-6600; Employment Regulations for the Classified Service of the San Diego Unified School District; San Diego Unified School District collective negotiations contracts; California Education Code §45285.
2. This procedure pertains to matters within the scope of collective bargaining. Contract language within specific collective bargaining agreements on this topic shall prevail over any language to the contrary in this procedure.

C. GENERAL

1. **Originating Office.** Suggestions or questions concerning this procedure should be directed to the Human Resource Services Division.
2. **Definitions.**
 - a. **Classification review:** A classification review may be conducted when a new position is established or when reorganization, new processes, new programs, or gradual changes have affected the duties and responsibilities of an existing position.
 - b. **Position:** A group of duties and responsibilities assigned or delegated by official authority and requiring full- or part-time employment of one person.
 - c. **Job class:** A group of positions sufficiently similar in duties and responsibilities that:
 - (1) The same descriptive title can be applied.
 - (2) The same requirements as to education, experience, knowledge, skills, and abilities can be required of incumbents.
 - (3) The same tests of fitness can be used to choose qualified employees and to establish eligible lists.
 - (4) The same schedule of compensation can reasonably and fairly be made to comply under the same, or substantially the same, conditions of employment.
 - d. **Occupational group:** A group of job classes determined through the process of classification as sufficiently similar in required skills, duties, knowledge, and abilities to

be related, ranked, and established as an identifiable job group within the classification plan of the district.

- e. **Change of classification involving loss of salary:** A change of classification not based on employee performance, to a classification at a lower salary grade on the same or a different salary schedule.
- f. **Group review:** A classification review of a group of positions with the same job title.
- g. **Reclassification committee:** A joint labor-management committee whose role is to accept, review and make recommendations to the Superintendent for requests for classification review; the committee consists of one representative from each classified bargaining unit and an equal number of district representatives.

3. **Classification Plan.**

- a. The district develops and maintains a position classification system which standardizes and classifies positions according to prescribed duties performed by classified personnel.
- b. Human Resource Services determines appropriate classifications for positions when:
 - (1) New regular or temporary positions are created.
 - (2) Significant material changes occur in duties and responsibilities of a position due to reorganization, new equipment or work processes, or new programs, and a review is requested by an authorized source specified in C.4.a. or C.4.b.
 - (3) Changes occur in positions in a department or the district which potentially affect related positions.

4. **Initiation and Scheduling of Requests for Classification Review.**

- a. **Request for review of a position held by an incumbent.** Requests for position classification review may be initiated by a regular classified employee (or a group of employees in the same classification), supervisor, department head, division branch head, Human Resource Services, or an employee's certificated exclusive employee representative. A request to review staffed positions must be signed by the supervisor.
 - (1) Employees shall submit the original to the supervisor between September 1 and October 15 to ensure that there is sufficient time to obtain all necessary signatures for submission to Human Resource Services by the October 31 deadline. (**Exception:** An exclusive representative is not required to submit a statement from the supervisor).
 - (2) The supervisor will review and return the signed document to the employee within five work days after receiving the document. The supervisor will obtain the signature of the principal/department/division head. If the principal is the immediate supervisor, it does not need to be submitted to the area superintendent. If the document is not returned to the employee within five work

SUBJECT: **Classification of Classified Staff Positions**

NO: **7540**

PAGE: **3 OF 6**

EFFECTIVE: **1-29-62**

REVISED: **8-10-16**

days, the employee may submit the document to the Human Resource Services Division.

- (3) The request must include a description of the basis for change and the major changes that have occurred in the duties and responsibilities assigned to the position.
 - b. **Request for classification of an approved new position or reclassification of a vacant position.** A supervisor, department head, division head, or branch head may initiate a request to classify an approved new position or reclassify a vacant position for which the duties have significantly changed. A Personnel Action Request (PAR) must be initiated electronically. A brief memorandum stating the basis for reclassification including the recommended classification; and an organization chart showing all positions, titles and names of employees and reporting relationships must be sent to Human Resources. A Request for Position Classification Review form is not required for new or vacant positions.
 - c. **Scheduling of classification studies.** Classification studies will be scheduled for completion in priority order as determined by the Chief Human Resources Officer according to the following:
 - (1) Approved new positions and vacant positions for which duties have significantly changed take priority over other position reviews.
 - (2) Classification reviews of existing positions in which there are incumbents (individual or group).
 - (3) Requests for jobs studied within the past three years will not be conducted unless substantial material changes in the position have occurred as defined in C.3.b.
 - d. Requests for classification studies will be accepted by Human Resources on an annual basis from September 1 through October 31.
 - e. The effective date of any recommendation for reclassification as a result of the review will be no earlier than July 1 of the fiscal year that the position classification was completed by Human Resources, or approved by the Board of Education if necessary.
 - f. The Reclassification Committee will complete the review of all requests for position classification review received during the annual submittal period from September 1 through October 15, and make recommendations by May 1 of the fiscal year. The finalization of position classification reviews that may require further auditing, and/or bargaining unit and board approval may extend beyond June 30.
 - g. Board action. Classification recommendations that require a board agenda item must be approved by the Superintendent before being submitted for the board agenda.
5. **Administration of positions downgraded.** (For represented employees, see the appropriate collective negotiations contract). Following reclassification, permanent employees whose classification and pay would be adversely affected by a reclassification

(see C.2.e.) shall be placed in "starred rate" status for a period not to exceed the duration specified in the appropriate contract/salary schedule. During this time the employee's salary shall be protected and adjusted in accordance with rules and regulations of the appropriate salary schedule for the job class to which the employee is assigned as a result of reclassification. During this period, an incumbent in such a position shall be required to accept any offered transfer or reassignment to a position in his/her earned higher job class or risk immediate forfeiture of starred pay-rate status.

6. **Reclassification effect on incumbent employee.** Classified employees occupying positions that are reclassified to a new or different class of positions shall be assigned to the new job class, except that when such reclassification results in a promotion, that employee shall be required to serve a probationary period in accordance with those rules. The salary of an employee in such a reclassified position shall be determined in accordance with current salary rules and regulations adopted by the Board of Education.
7. **Appeal Procedure.**
 - a. Determination of classification and salaries of employees is not within the scope of grievance procedures for represented or non-represented employees, nor the scope of subjects that may be submitted to the classified employees' hearing officer.
 - b. An employee, division head, or employee organization exclusive representative may appeal the classification results in writing to the Reclassification Committee within 30 calendar days of notification of the results of the classification study. An appeal hearing will be scheduled and the Reclassification Committee will respond in writing to the appeal within 45 calendar days of the date of receipt of the appeal.

D. IMPLEMENTATION

1. **Classification review of an existing position.**
 - a. Initiator of review completes Position Classification Review form including a detailed description of duties of position, basis for change, and a current organization chart.
 - b. Supervisor reviews, signs, and forwards form and statement of basis for change to the Human Resource Services Division.
2. **Initiator of request for review of approved new position.**
 - a. Initiates a Personnel Action Request (PAR) electronically. Sends a brief memorandum stating the basis for change referencing the PAR number and an organization chart to the Human Resource Services Division.
3. **Human Resource Services Division.**
 - a. **Classification review of an existing position with an incumbent or group review.**
 - (1) Date/time-stamps position classification review form when received.

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- (2) Acknowledges receipt of request to originating department; reviews request with appropriate management personnel and incumbent(s); and determines appropriate classification.
 - (3) Notifies cabinet division head as appropriate.
 - (4) Initiates action forms for submission on agenda to the Board of Education.
 - (5) Following official board action, sends appropriate cabinet division head written notification of action taken and effective date.

b. **Classification request for new position.**

- (1) Reviews documentation and contacts cabinet division head if additional information is needed.
- (2) Determines classification.
- (3) Initiates action forms for submission on agenda to the Board of Education.
- (4) Following official board action, sends appropriate cabinet division head written notification of action taken and effective date.

4. **Reclassification not involving classification review** (e.g., Landscape Technician I to Landscape Technician II). Human Resource Services verifies successful completion of service and reclassifies employee based upon supervisor recommendation that conditions specified in the official position description have been met. Status is changed to probationary.

Note: An employee's supervisor has the responsibility to notify Human Resource Services by memorandum if satisfactory job performance has not been maintained, and that the reclassification is not appropriate.

E. FORMS AND AUXILIARY REFERENCES

1. Employment Regulations for the Classified Service of the San Diego Unified School District booklet given to each new classified employee by the Human Resource Services Division
2. Available from the Human Resource Services Division:
 - a. Request for Position Classification Review Instructions/Form
 - b. Request for Position Classification Review Instructions and Appeal Form
 - c. Position Classification: "What's It All About?" booklet
 - d. Standard position descriptions
3. Personnel Action Request (PAR) available electronically.

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F. REPORTS AND RECORDS

G. APPROVED BY



General Counsel, Legal Services
As to form and legality

H. ISSUED BY



Chief of Staff