



## **ADMINISTRATIVE PROCEDURE**

CATEGORY: **Personnel, Classified Staff**

SUBJECT: **Classification of Classified Staff Positions**

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### **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

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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

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(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.

- (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**

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General Counsel, Legal Services  
As to form and legality

**H. ISSUED BY**

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Chief of Staff