

**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.