



# ADMINISTRATIVE PROCEDURE

SAN DIEGO UNIFIED SCHOOL DISTRICT

NO: 7540

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CATEGORY: **Personnel, Classified Staff**

EFFECTIVE: **1-29-62**

SUBJECT: **Classification of Classified Staff Positions**

REVISED: **3-2-04**

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

## B. LEGAL AND POLICY BASIS

1. **Reference:** Board policy: I-5000, I-5500, I-6600; Education Code Section 45285; Employee Regulations for the Classified Service of the San Diego Unified School District, Article IV; collective negotiations contracts.
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 Classification and Recruitment Unit, Human Resources Department, Office of the Superintendent.
2. **Definitions**
  - a. **Classification Review:** A classification review is 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.
3. **Classification Plan**
- a. **The school district develops and maintains** a position classification system which standardizes and classifies positions according to prescribed duties performed by classified personnel.
  - b. **The Classification and Recruitment Unit,** Human Resources determines appropriate classifications for positions when:
    - (1) New regular or temporary positions are created.
    - (2) Significant 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., C.4.b., or C.4.c.

- (3) Changes occur in positions in a department or unit 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, supervisor, department head, division branch head, Human Resources, or an employee's certified exclusive employee representative. A request to review staffed positions must be signed by the supervisor, department head, and division head, and branch head and 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. (**Exception:** An exclusive representative is not required to submit a statement from the supervisor.) An organization chart must be included showing all positions, titles, and names of incumbents and reporting relationships.
- 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 changed significantly at any time. 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 the Classification and Recruitment Unit. A "Position Classification Review" form (E.2.a.) is not required for new or vacant positions.
- c. **Request for a group review.** Group reviews may be initiated by a group of regular classified employees, supervisor, department head, division head, branch head, Human Resources, or an employee's exclusive employee representative. The Director, Classified Personnel will determine on a case-by-case basis if a "Position Classification Review" form must be completed by each incumbent in the group or if a random sampling is sufficient. The request must include a description of the basis for change and the major changes that have occurred in the duties and responsibilities of the position.
- d. **Scheduling of classification studies.** Normally, position reviews are conducted in chronological order of the date the completed request is received by the Classification and Recruitment Unit.

- (1) Approved new positions and vacant positions for which duties have changed significantly take priority over other position reviews and will be accepted at any time.
  - (2) Classification reviews of positions in which there are incumbents (individual or group) will be accepted at any time. The effective date of any recommendation for reclassification as a result of the review 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 Position Classification Review form was received and time stamped in the Classification and Recruitment Unit.
- e. **Board action.** Classification recommendations that require a separate board agenda item are reported to the superintendent for review and inclusion on the board agenda at the next available meeting.
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. If, in the judgment of the Chief Human Resources Officer or designee, an incumbent's reasons for nonacceptance of such a transfer or reassignment are reasonable, the employee may continue in starred-rate status for a length of time not to exceed the balance of the original period specified in the contract.
6. **Reclassification Effect on Incumbent Employee.** Classified service employees occupying positions that are reclassified to a new or different class of positions shall be assigned to the new job class without regard to other provisions of Employee Regulations for the Classified Service, 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. **Reclassification Effected Without Job Study.** When specified in the official position description, an employee's position may be reclassified to the next higher level without a job study, provided that all conditions specified in the position description have been met and the supervisor recommends the reclassification in writing.
8. **Appeal Procedure**
  - a. **Determination of classification and salaries of employees** is not within the scope of grievance procedures for represented or nonrepresented employees, nor the scope of subjects which may be submitted to the classified employees' hearing officer.
  - b. **Level One Appeal.** An employee, supervisor, department head, division head, branch head or employee organization exclusive representative may appeal the classification results in writing to the Director, Classified Personnel within thirty (30) calendar days of notification in writing from the Classification and Recruitment Unit of the results of the classification study. The Director, Classified Personnel will meet with the employee and respond in writing to the appeal within thirty (30) calendar days of the meeting.
  - c. **Level Two Appeal.** An employee, supervisor, department head, division head, branch head or employee organization exclusive representative may appeal the level one appeal results in writing to the Chief Human Resources Officer within thirty (30) calendar days of notification in writing from the Director, Classified Personnel of the results of the level one appeal. Chief Human Resources Officer will meet with the employee and respond in writing to the appeal within thirty (30) calendar days of the meeting. The decision rendered by the Chief Human Resources Officer shall be final.

## D. IMPLEMENTATION

1. **Classification Review of Position With an Incumbent or Group Review**
  - 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. **Principal or department head** reviews, signs, and forwards form and statement of basis for change to the Classification and Recruitment Unit, via appropriate division head and branch head. Requests by employees, or reviews

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initiated by the Classification and Recruitment Unit, should be forwarded within a period not to exceed (30) thirty days. Management employee's signature on a form shall not be construed as recommendation either for or against a change in position's classification.

2. **Initiator of Request for Review of Approved New Position or Vacant 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 Classification and Recruitment Unit.
3. **Classification and Recruitment Unit**
  - a. **Classification review of position with an incumbent or group review**
    - (1) Date/time-stamps position classification review form or memorandum when received. Group reviews must be reviewed by the Director, Classified Personnel prior to acceptance by the Classification and Recruitment Unit.
    - (2) Acknowledges receipt of request to originating department and incumbent(s); reviews request with appropriate management personnel and incumbent(s); determines appropriate classification.
      - (1) Notifies division department head, or branch head involved, as appropriate.
      - (4) For approved recommended changes that do not require a separate board agenda item, initiates action forms for submission on any regular agenda to the Board of Education.
      - (5) For recommended changes that require a separate board agenda item, initiates appropriate agenda materials.
      - (6) Following official board action, sends appropriate division head, department head, branch head, or principal and incumbent written notification of action taken and effective date of change or of studies resulting in no action taken for change.

**b. Classification review of new or vacant position**

- (1) Reviews documentation and contacts supervisor, department head, division head, or branch head if additional information is needed.
- (2) Determines classification.
- (3) For changes that do not require a separate board agenda item, initiates action forms for submission on any regular agenda to the Board of Education.
- (4) For recommended changes that require a separate board agenda item, initiates appropriate agenda materials.
- (5) Following official board action, sends appropriate division head, department head, branch head, and incumbent written notification of action taken and effective date of change.

4. **Reclassification Not Involving Classification Review** (e.g., Landscape Technician I to Landscape Technician II Classification and Recruitment Unit verifies completion of service and reclassifies employee based upon the conditions specified in the official position description being met. Status is changed to probationary.

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

5. **Reclassification of Clerk Typist I to School Clerical Assistant**

- a. **Employee**, upon completion of two years as a monthly paid clerk typist I in one or more school site locations, completes duties section of "School Clerical Assistant Classification Request" form (E.2.e.); submits to principal.
- b. **Principal** reviews form, discusses performance evaluation with employee, and completes performance evaluation section.
  - (1) If request is endorsed, initiates a PAR electronically indicating change in classification; and submits "School Clerical Assistant Reclassification Request" form (E.2.e.) to the Classification and Recruitment Unit.

- (2) If request is not endorsed, explains reasons to employee; and sends form to Human Resources for filing in employee's personnel folder.
- c. **Classification and Recruitment Unit** verifies length and variety of service requirement; approves PAR to initiate submission for action form for Board of Education approval.

#### **E. FORMS AND AUXILIARY REFERENCES**

1. Employee Regulations for the Classified Service of the San Diego Unified School District booklet given to each new classified employee by the Human Resources Department.
2. Available from the Classification and Recruitment Unit:
  - a. Position Classification Review form
  - b. Instructions for preparing Position Classification Review form
  - c. Position Classification: What's It All About? booklet
  - d. Standard position descriptions
  - e. School Clerical Assistant Classification Request form
3. Personnel Action Request (PAR) available electronically.

#### **F. REPORTS AND RECORDS**

#### **G. APPROVED BY**



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Chief of Staff, Leslie Fausset  
For the Superintendent of Public Education