



ADMINISTRATIVE PROCEDURE

SAN DIEGO UNIFIED SCHOOL DISTRICT

NO: 7610

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CATEGORY: **Personnel, Management/Supervisory Staff**

EFFECTIVE: **7-25-66**

SUBJECT: **Classification of Management Salary
Schedule Positions**

REVISED: **6-08-2001**

A. PURPOSE AND SCOPE

1. To outline administrative procedures governing classification reviews of Management Salary Schedule positions, and establishing and classifying new position classes on the Management Salary Schedule.
2. **Related Procedures:**

Salary administration for management employees	7621
Recruitment, selection, promotion, and reassignment/transfer of management employees	7640
Certificated personnel allocation formula and class size, K-6 (regular education programs)	7215
Certificated personnel allocation formula and class size, secondary schools (regular education programs and JROTC)	7216

B. LEGAL AND POLICY BASIS

1. **Reference:** Board policy: A-4520, C-3000, I-1000, I-1020, I-1160, I-1300, I-7000, I-7001.

C. GENERAL

1. **Originating Office.** Suggestions or questions concerning this procedure should be directed to the Human Resource Services Division, Administrative Operational Support.
2. **Classification Plan.** The purpose of the management classification plan is to provide a systematic method of appraising the relationship of each management position to other management positions in the organization. The management classification process is designed to provide a quantitative system for gathering facts about positions and provides a technical guide for evaluating, classifying, and grading positions. The process includes the following steps:
 - a. An *initial* analysis, evaluation, and tentative classification is made by an analyst in the Human Resource Services Division. Positions are evaluated by means of a factoring *and* ranking method; the total evaluation is based upon a professional judgment.

- b. A *review* of the wage and salary analyst's classification recommendation is made by his/her supervisor and the Classified Personnel Director. This review includes an evaluation of individual job factors as well as a total evaluation.
- c. The division head responsible for the position being classified reviews and responds, if necessary, to the recommendation.
- d. If the division head disagrees with the recommendation, he/she may review the findings with the Classified Personnel Director. If the division head wishes to further appeal the recommendation following review with the Classified Personnel Director, he/she may request a review of the recommendation by the Human Resource Services Deputy Administrative Officer.
- e. The Administrators Association is notified of classification recommendations being considered for Board of Education action. The association representative shall be given an opportunity to review the findings with the Classified Personnel Director. If the Administrators Association wishes to appeal a recommendation following this review, the association may confer with the Human Resource Services Deputy Administrative Officer.
- f. The superintendent is notified of the final recommendation.
- g. The superintendent reviews the recommendation and makes a final recommendation to the Board of Education.

3. **Classification Reviews**

- a. A classification review generally becomes advisable when a *recognized, significant change* occurs in the duties and responsibilities of an individual position or class of positions. Organizational changes normally initiate classification reviews.
- b. A classification review can result in a recommendation for *upgrading, downgrading, or no change* in classification of the position or class of positions.
- c. A review of the proper salary placement of a major class of *positions or a group of position classes* on the Management Salary Schedule may become necessary when it is suspected that a major class or group may be improperly placed for salary purposes.

- d. Existing relationships among position classes established as a result of job design or analysis, evaluation, and classification processes require *regular periodic review* to ensure equity of relationships and to provide conditions conducive to good staff morale.
- e. When, through job analysis, it becomes apparent that two or more positions in different job classes have *overlapping responsibilities*, a classification review is appropriate.
- f. Significant changes in duties and responsibilities of a position or position class resulting in an *increase or decrease* in either *complexity of work* or *number of positions supervised* may be cause for a classification review.

4. **Processing Regulations**

- a. The initiator of a classification request may contact the Human Resource Services Division concerning the progress of the study at any time.
- b. If the recommendation to be taken to the Board of Education would result in the employee being reclassified to a lower classification, the employee will be notified in writing of the proposed classification prior to official action by the Board of Education. The employee will be given an opportunity to review the findings of the reclassification study in a private conference with the Classified Personnel Director and may subsequently request that the classification recommendation be reviewed by the Human Resource Services Deputy Administrative Officer.
- c. Requests for classification of new positions shall be forwarded to the Human Resource Services Division for determination of proper classification. No employee of the school district is authorized to make any commitments regarding salary grade of a new or proposed position class until the Board of Education has approved establishment of the position class and assigned a salary grade.

5. **Job Evaluation Instrument Used**

- a. All classes of positions compensated on the Management Salary Schedule, except those specifically exempted by the Board of Education, shall be classified by the district's job evaluation instrument. This instrument is designed to evaluate four specific factors of each job; each factor is subdivided into levels or degrees to which values have been assigned. Factors used are:

(1) knowledge, (2) contacts, (3) leadership accountability programs, and (4) scope of impact of decisions.

- b. After a job has been evaluated by the instrument alone, a cross-check is made against all other jobs on the same four factors. Essentially, this is a ranking procedure that compares job against job on each of the factors.
- c. After a job has been classified by 5.a. and 5.b., a final check is made on how this classification "fits" the overall classification plan in terms of normal promotional lines within a division and lateral relationships to jobs in other divisions.
- d. The outlined process is based on the premise that job evaluation methods should not be regarded as conclusive because of their appearance of objectivity; professional judgment also must be exercised so that the resultant classification plan is sound logically as well as technically.

D. IMPLEMENTATION

1. Classification Reviews for Management Salary Schedule Individual Positions or One-Position Classes

- a. **Source of review request.** Request for a classification review may be initiated by any of the following:
 - (1) Individual through immediate supervisor
 - (2) Immediate supervisor through division head
 - (3) Division head
 - (4) Human Resource Services Division
 - (5) Professional school administrators organization through the Human Resource Services Division
- b. **Evaluation method.** When requesting that a study be made, the procedure below normally shall be followed:
 - (1) Originator of request prepares "Management Position Classification Questionnaire" outlining current duties, responsibilities, and reporting

relationship; prepares draft of *updated position description and updated organizational chart*.

- (2) "Management Position Classification Questionnaire" and updated position description are *approved by originator's immediate supervisor and division head* and forwarded to the Human Resource Services Division.
- (3) Evaluation process shall include job analysis, job description preparation, and a classification recommendation using district's management job evaluation instrument as a general guide, or other job evaluation techniques if appropriate. This analysis and classification recommendation shall be accomplished by the Human Resource Services Division.

2. **Classification Reviews Affecting Major Classes or Groups on Management Salary Schedule**

- a. **Source of review request.** Request for class or group classification review may be initiated by any of the following:
 - (1) Immediate supervisor through division head
 - (2) Division head
 - (3) Professional school administrators organization
 - (4) Human Resource Services Division
- b. **Evaluation method**
 - (1) When request is made by a division head, method followed is same as outlined in D.1.b.
 - (2) When request is made by a professional school administrators organization, a written request outlining reasons for requested investigation and recommended action shall be submitted by organization to the Human Resource Services Deputy Administrative Officer.
 - (3) Initial study and analysis of a classification request will be made by:
 - (a) Human Resource Services Division staff.

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(b) Other division representation (affected divisions).

c. **Communications.** Final results of classification reviews shall be reported in writing to originator(s) of request(s).

3. **Establishing and Classifying New Position Classes**

- a. **Source of request.** A request for establishing a new position class on Management Salary Schedule may be initiated by a division head. These requests may originate at any time, but should precede appointment of an individual to the new position by at least three months in order to provide adequate time for analysis, evaluation, classification, and approval.
- b. **Job design questionnaire.** Originator of request prepares a "Management Position Classification Questionnaire" outlining duties, responsibilities, reporting relationships, and training and experience requirements for proposed position.
- c. **Human Resource Services Division** conducts job analysis, job description preparation, and job evaluation in accordance with D.1.b.(3) and, after securing approvals of recommended salary grade from superintendent, places item on Board of Education agenda to establish position class and salary grade.

E. FORMS AND AUXILIARY REFERENCES (Available from the Human Resource Services Division)

1. Management Position Classification Questionnaire (for current positions only—filled or vacant)

F. REPORTS AND RECORDS

G. APPROVED BY



Chief of Staff, Terrance L. Smith
For the Superintendent of Public Education