

# A Guide to Understanding Position Classification

## PERSONNEL COMMISSION



### CLASSIFIED PERSONNEL SERVICES

#### FOREWORD

This publication is intended to provide a basic introduction to position classification. Much of the following discussion is applicable to position classification in private industry and other governmental agencies, as well as in the classified service of the Santa Clara County Office of Education. Some parts are related specifically to position classification as practiced by the Personnel Commission and its staff.

The Personnel Commission is responsible for establishing and maintaining the classification plan for all positions in the classified service at the Santa Clara County Office of Education. Classes (or classifications) are assigned into groups according to general occupational nature and, within groups, are assigned within series, whenever practicable, by specific class titles. The Commission employs the Director of Classified Personnel Services and other technical staff to analyze and study positions, and make recommendations to the Commission regarding the classification of positions including its "class title", "function, responsibilities, and duties", "the required skills, abilities, and knowledge", and "salary ranges".

The Commission may establish new classes, revise existing classes, and abolish or combine existing classes or class series within the classified service as the needs of the service require. All additions, revisions, and/or deletions to the classification plan are reported to and acted upon by the Personnel Commission at its regular open meeting, where administrators, employees, and employee representatives may express their view points. Although the Director may proceed with certain classification changes subject to ratification of the Commission, only the Commission may classify a position.

#### GLOSSARY OF TERMS

To better understand the processes, procedures and points discussed in this booklet, definitions of a few basic terms should be understood.

- ◆ A **position** is a group of current duties and responsibilities assigned by official authority and requiring one person to perform them. Thus, a position may exist even though it is not filled. A position is usually established by a budget action setting aside funds for salary and other costs. A position may be full-time or part-time.
- ◆ A **class** is a group of positions that perform sufficiently similar duties and responsibilities, in the judgment of the Personnel Commission, that the same title can be applied, and the same wage or salary range is appropriate. Positions in the same class require the same qualifications and (merit system) tests for positions in the class. A class may consist of one position or many; at times, some classes do not have a position currently assigned to them, but may continue to exist for the purpose of future use.
- ◆ A **class description** is the Personnel Commission's statement describing a class, listing typical duties, and setting forth the qualifications for the class. A class description is not a complete list of all duties assigned to positions in a class, but rather, it is a summary of the more important duties and responsibilities.
- ◆ A **reclassification** is gradual accretion of duties and responsibilities of a position which, when verified by investigation and study, results in a change of classification.

- ◆ A **series** is a group of classes closely related in occupational hierarchy and arranged in a list indicating occupational levels.

## **BASIC CONCEPTS OF POSITION CLASSIFICATION**

Classification is the act of bringing similar items together into groups and categorizing each group as well as recognizing common characteristics of and defining distinctions between groups. For example, a warehouse is separated into several departments, where materials are stored according to their “classification”, such as hardware, custodial supplies, paper products, business forms, etc.

The Personnel Commission classifies positions. The Commission's staff analyzes positions and makes recommendations regarding their proper class. In most cases, the Commission's staff works within the framework of the existing classification plan, which is an arrangement of classes into occupational groups.

The **first step** is to determine the proper occupational category (class series) into which a position should be placed. In other words, should the position be assigned to the aide series, accounting series, secretarial series, or custodial series, etc.

The **second step** further refines the broad grouping. For example, a position is categorized as belonging in the secretarial series; in the second step, Commission staff determines if the position should be assigned to the administrative assistant group, school office group, or another group within the secretarial series.

The **third step** is the most difficult, for the Commission's staff evaluates the level of the position within the Series and Group. In other words, should the previously discussed secretarial series position be recommended as an "Administrative Assistant I", "Administrative Assistant II", or "Administrative Assistant III". In this step, various evaluation methods are used, depending on the distinctions between classes in the appropriate Group and Series.

The process of position classification is complex and requires skill in the research, application, and analysis of job-related information and salary data. The position classification plan is dynamic, changing to meet the needs of the service and requiring the continuous attention of a professional staff.

## **USES OF POSITION CLASSIFICATION**

At the County Office of Education, the principle of “like pay for like work” is observed. By allocating similar positions in the same class and setting a wage or salary range for that class the Personnel Commission is implementing that principle. Under the merit system, employees are hired and promoted on the basis of the results of competitive examinations. The Commission's recruitment staff conduct examinations and establish eligibility lists for a class, not an individual position. Thus, the position classification plan serves the merit system election process. In addition, the class titles, entrance qualifications, and other components of class specifications are necessary for the purposes of recruitment, examination, and assignment of classified personnel. The position classification plan serves various other needs, such as budgeting and staff planning, and is useful to employees and administrators for identification of occupational groups of positions and employees.

## **TYPES OF CLASSIFICATION STUDIES**

The County Office of Education continually establishes positions to meet the service needs of its students and programs. In most cases, the assigned duties fit within an existing class. If an appropriate class does not exist, a classification study is conducted, a new class specification is prepared, and a wage rate is determined and assigned to the appropriate salary schedule. Classification studies of existing positions are continually conducted, usually because of routine changes in duties and responsibilities, or to determine if a class is properly salaried, or in response to incumbent(s) petition for reclassification.

In the course of a classification study, the Personnel Commission staff reviews the duty statements, organization chart, and other pertinent information. The Commission staff usually “audits” the position under study by interviewing incumbents and supervisors, observing work processes, and, in some cases, verifying the duties and responsibilities of other employees in related positions. When a large group of similar positions is under study, only a select few positions are audited.

Position audits are the primary study method in responding to reclassification petitions. In a reclassification study, position incumbents claim to be responsible for additional functions and duties that require higher skills, abilities, and knowledge above those described in the position's existing class specifications. Commission staff determines if the petition for reclassification is justified and requires the position to be reclassified to a higher existing class or establishment of a new class.

As such, the results of a reclassification position audit will in itself determine if the incumbent's petition is warranted to the extent that it requires further study. In cases where the results of position audit do not support the incumbent's petition, the Commission staff will terminate the study and recommend the Personnel Commission deny the petition.

Further steps in the classification study are determined by the circumstances. A survey of other public school or agency employers may be made to determine their practices in regard to titles, salaries, recruitment strategies, entrance qualifications, and other matters. An internal comparison of existing classes at the County Office is also completed. As a result, Commission staff may recommend no change or revisions in title, salary, class description, and other items. Tentative recommendations are discussed with the administration and employee representatives, if any are involved. Incumbents of affected positions are notified of these recommendations prior to the Personnel Commission's final action.

## OTHER IMPORTANT POINTS ABOUT CLASSIFICATION

1. The Personnel Commission does not prescribe the duties of any position at the County Office (except those of its Director and staff in Classified Personnel Services). After the administration prescribes a position's duties, the Commission will determine the appropriate classification.
2. A class specification includes a list of "typical duties" of a class, but it does not prevent the assignment of other duties to any position in that class. If additional duties are assigned that are different in nature or level, then a classification study should be requested. An employee should not refuse to perform a duty simply because it is not specifically listed in the class specification.
3. A change in the duties of a position may or may not result in a change in classification or salary. In some cases, new duties are determined to be within the scope of and reasonably related to the current classification; in that event, the only change may be a revision of the class description. In other cases, where a position demonstrates a change that encroaches into teaching or management positions, a change is not possible due to credentialing, special license, or certification requirements dictated by Education Code, Fair Labor Standards, or Merit System Rules, etc. In such cases, the Commission's staff will facilitate discussions or propose methods of resolving such matters with administration and employee representatives.
4. In order for an incumbent's position to be reclassified, the incumbent must demonstrate that his/her position has been occasioned by a gradual and substantial accretion of duties. A sudden change to the position's duties resulting from reorganization or the assignment of completely new duties and responsibilities will not serve as a basis for reclassification. Based on the recommendations and/or findings by its staff, the Commission shall determine as to whether the reclassification petition is valid.
5. When all the positions in a class are reclassified upward, those incumbents with three or more years of service in the class may be reclassified with the positions. When a portion of the positions in a class are reclassified upward, those incumbents with three (3) or more years of continued service in one (1) or more of the positions being reclassified may be reclassified with their positions.
6. In addition to meeting the requirements of described, above, in Item 5, the incumbent must provide the Commission with satisfactory evidence that he/she meets the minimum qualifications of the higher class specification, which may require the incumbent to successfully pass the examination for that classification including demonstration of pertinent skills.
7. Various forms are used in the classification process. The most common form is the "*Classification Service Request*", which is used to initiate a request by administration for study of a new or existing position. Basically, the form requires identification of the position(s) involved, rationale for the request, and a statement of duties. The other common form is the "*Reclassification Questionnaire*", which serves as an employee's method to initiate a petition for reclassification to a different (higher) class. Again, the employee must demonstrate that the position described in the petition has been occasioned by a gradual and substantial accretion of duties.
8. The Personnel Commission cannot unilaterally change or revise salaries for positions in classes represented by recognized labor unions or associations. In such circumstances, Office administration and the Director of Classified Personnel Services will meet and confer with appropriate representatives on the impact of such changes prior to the Commission's approval of any revisions to class specifications and salary ranges.

THE SCOPE AND DEPTH OF THIS DISCUSSION OF "POSITION CLASSIFICATION" HAS BEEN LIMITED TO A BRIEF INTRODUCTION TO THE TOPIC. THE PERSONNEL COMMISSION STAFF IS AVAILABLE, AT THE ADDRESS AND TELEPHONE NUMBER BELOW, FOR ADDITIONAL INFORMATION OR CLARIFICATION RELATING TO POSITION CLASSIFICATION, RECLASSIFICATION, SALARY ADMINISTRATION, OR FOR SPECIFIC INFORMATION RELATING TO POSITIONS, CLASSIFICATION SPECIFICATIONS, OR CLASS SERIES IN THE CLASSIFIED SERVICE OF THE SANTA CLARA COUNTY OFFICE OF EDUCATION.

**A PUBLICATION BY CLASSIFIED PERSONNEL SERVICES**

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