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August 1, 1985

PD 85-06

TO: Vice Presidents, Deans, and Division Directors
FROM: Gail Fullerton
President 
SUBJECT: Presidential Directive 85-06
Position Classification Program

This Presidential Directive supersedes PD 81-09 and applies to positions subject to classification and reclassification throughout the University.

Since 1976, San Jose State University has had approval authority for all support staff and administrative classification decisions delegated to the President by the Chancellor. With this authority came the responsibility for the University to adhere to the classification and qualifications standards established by the California State University system. It is my responsibility to assure that the principles of classification are consistently and equitably applied throughout the University.

The University Personnel Office provides staff services with respect to the review and classification or reclassification of support staff positions. Detailed information concerning the position classification program and operational procedures is provided in the attachment. Questions concerning the position classification program and the delegation of classification authority should be directed to the University Personnel Office. This information should be shared with all employees.

GF:lvh

Attachment

POSITION CLASSIFICATION PROGRAM*

SAN JOSE STATE UNIVERSITY

August 1, 1985

Presidential Directive 85-06
(Supersedes PD 81-09)



Gail Fullerton, President

DELEGATION OF CLASSIFICATION AUTHORITY

Effective October 1, 1976, the authority for classifying most campus positions that are subject to allocation to the Classification Plan of the California State University (CSU) system was delegated to this University by the Chancellor. This delegation does not include the authority to establish new classes or pay ranges or to modify existing classes or pay ranges. This delegation does not apply to positions in the Management Personnel Plan.

POLICY STATEMENT

It is the policy of San Jose State University to provide a Position Classification Program that will uphold the job classification and qualification standards of the CSU system and, through the position classification process, assure that the principle of "equal pay for equal work" is consistently and effectively applied.

PROGRAM OBJECTIVE

There are two objectives of the program:

- 1) to assure the highest possible degree of equity in position classification for all employees whose positions are subject to allocation to the Classification Plan of the CSU system;
- 2) to maintain the right and responsibility of managers to assign duties to employees.

PROGRAM RESPONSIBILITY

The President of San Jose State University has overall responsibility for the Position Classification Program.

* The program outlined here applies to all classifications except Student Services Professional classes in the Student Services Division, Librarians, and positions in the Management Personnel Plan.

The University Personnel Officer is responsible for the administration of such policies, procedures, regulations and guidelines deemed necessary to uphold the classification and qualification standards of the CSU system.

POSITION CLASSIFICATION AND REVIEW: GENERAL STATEMENT

Although classification authority has been delegated to the President, San Jose State University must maintain the system-wide classification and pay plan. At the same time, the University must recognize valid changes in work assigned to individuals and adjust classifications appropriately. The position classification review process provides for recognition of substantial and permanent changes in assigned duties and responsibilities that alter the basic nature or level of work performed.

All requests for position review are to be forwarded through appropriate organizational channels before submission to the Personnel Office. Approval to conduct a classification review must be secured from the President or the President's designee for this approval. In the areas of their responsibility, the AVP, EVP, or DSS will be the President's designee for this required approval.

A request for classification review will not be denied if it is apparent that the position has undergone significant change.

However, approval to conduct the review does not mean approval of a reclassification of the position if the review determines that the duties assigned no longer accord with existing classification. It may be determined by management that the assigned duties need to be changed to accord with the existing classification. If this is the outcome, the immediate supervisor will have the responsibility of restructuring the duties assigned to keep them in accord with the position classification.

Possible outcomes of the classification review are three:

1) It may be determined that the existing classification encompasses the assigned duties;

2) It may be determined that the assigned duties exceed the existing classification, and the supervisor may be asked to alter the assignment to accord with the existing classification; or

3) It may be determined that the assigned duties exceed the existing classification and the position may be reclassified to accord with the duties and responsibilities currently assigned.

The determination of whether the duties assigned accord with the existing classification is the responsibility of the Personnel Office. In those

instances in which the assigned duties are determined to exceed the existing classification, the decision regarding whether the duties or the classification should be changed will be made by the President on the recommendation of the Academic Vice President (AVP), the Executive Vice President (EVP), or the Dean of Student Services (DSS), as appropriate.

INITIATION OF POSITION REVIEWS

A position classification review may be generated in one of four ways, as follows:

- ° A request for position classification review initiated by the employee through his or her supervisor;
- ° A request for position classification review initiated by the supervisor;
- ° A request for position classification review initiated by the Personnel Office;
- ° A position classification review is mandated by the Chancellor.

1) Position classification review is requested by the employee.

1.a. The position incumbent and the immediate supervisor will discuss reclassification possibilities on a preliminary basis.

If an employee requests a classification review of the position he or she currently occupies and this request is denied by the employee's supervisor or dean or director, the employee may appeal the denial to the AVP, EVP, or DSS, as appropriate. The Vice President or the Dean of Student Services will apply the criteria stated above, and will render a decision on the request for classification review which shall be final.

1.b. The immediate supervisor will draft a position description, detailing the current duties and responsibilities of the position as he or she has assigned them. A transmittal form for this purpose may be obtained from the Personnel Office, together with a Guide for Writing Position Descriptions. A position description already on file, if it is current and accurate, may be used.

1.c. The position description will be reviewed in draft form with the employee with respect to content. The description should be complete and accurate, in the judgment of the supervisor, when the material is prepared for discussion with the next line manager.

Position Classification Program

San Jose State University

Page Four

1.d. The supervisor will forward the position description, together with a current organizational chart, to the next level of supervision for approval and further transmittal. The Dean or Director of the division will either deny the request for classification review or forward it with approval to conduct the review to the AVP, EVP, or DSS as appropriate.

1.e. The Vice Presidents and the Dean of Student Services have authority to initiate a classification review or to deny the request for review. If the classification review is approved, the Vice President or the Dean of students, as appropriate, will notify the Personnel Office and request that a classification review be scheduled. If the request is denied, the Personnel Office will be sent a copy of the denial.

2) Position classification review is requested by the supervisor.

The immediate supervisor may initiate a classification review. The steps detailed in 1) above will be the same.

When the position is vacant, there will be no position incumbent with whom the supervisor can discuss the job description. The rest of the process remains without change.

The review of classification process should be completed before the job announcement is sent out, so that, if there is a change in the position description and classification, such changes can be properly approved prior to the initiation of the search process.

3) Position classification review is requested by the Personnel Office.

3-a. The Personnel Office will advise the appropriate administrators in advance, indicating the reason for conducting a review, and providing a transmittal form to the supervisor and employee to use in completing the position description along with a Guide for Writing Position Descriptions.

3-b. The supervisor will explain to the employee why a review is being conducted and will prepare a position description, using the transmittal form and the Guide provided by the Personnel Office. A position description on file may be used, if it is current and accurate.

3-c. The supervisor will discuss the position description with the employee with respect to content. The description should be complete and accurate, in the judgment of the supervisor, when the material is forwarded to the next line manager for approval.

3-e. The supervisor will forward the position description together with a current organizational chart to the next level of supervision for approval and further transmittal. The Dean or Director will either deny the request or forward it with approval to the AVP, EVP, or DSS, as appropriate.

3-f. The Vice Presidents and the Dean of Student Services have authority to deny the request for review in their respective areas of responsibility. If the classification review is approved, the Vice President or the Dean of Students, as appropriate, will notify the Personnel Office and request that a classification review be scheduled. If the request is denied, the Personnel Office will be sent a copy of the denial.

4) Position classification review is mandated by the Chancellor.

The Personnel Office will inform the persons occupying affected positions and their supervisors that a position classification review has been mandated by the Chancellor. The remaining steps will be essentially similar to 3) above.

POSITION REVIEW AND DECISION PROCEDURES

A position classification review is not a review of the performance of the incumbent. It is the set of duties and responsibilities assigned by management to a particular position that is reviewed for its fit with classification standards.

In most cases, a position classification review involves the review of a current position description and comparison of that job description with classification standards. The review may also include discussion with the immediate supervisor and a classification conference with the employee. Classification conferences are typically held at the work site and may include observation of work processes, familiarization with forms, procedures, equipment or facilities, discussions with other departmental personnel, or other appropriate means of obtaining factual information.

In conjunction with the analysis of a given position, it is occasionally necessary to review additional positions in order to clarify the relationship of positions within or outside the organizational unit before a classification determination can be made.

The Personnel Officer is responsible for implementing the following position classification review procedures:

1) The receipt of all requests for position review that have come through the appropriate channels detailed above will be acknowledged in writing by the Personnel Office.

2) Requests for position review will be scheduled in the order received unless there is a position review mandated by the Chancellor or the President that must be given priority.

3) If a classification determination can be made upon reading the written justification submitted to the Personnel Office, it may be possible to forego a classification conference with the employee and the employee's immediate supervisor. The results of this review of the documents will be shared with the appropriate administrators.

4) If a classification conference is deemed appropriate by the Personnel Office, arrangements will be made in advance and the visitation will be scheduled at a time convenient for the supervisor and the employee currently occupying the position being considered. Except for the actual classification conference with the employee, all contacts between the Personnel Office and the office where the position is located will be directly with supervisors.

5) If the duties and responsibilities currently assigned to the position are determined to fall within the scope of the existing classification by the Personnel Office, the Personnel Office will so inform the immediate supervisor, with a copy to the other line administrators concerned.

6) If the duties and responsibilities currently assigned to the position are determined by the Personnel Office to go beyond the scope of the existing classification, the Personnel Office will so inform the AVP, EVP, or DSS as appropriate.

7) The AVP, EVP, or OSS has the authority to approve the reclassification or to require that the immediate supervisor change the assigned duties to accord with the existing classification.

8) If the reclassification has been approved by the AVP, EVP, or DSS, the Personnel Office will prepare and forward Form 613 to the President for final approval.

9) The President will review the documentation and may approve the reclassification or request that the AVP, EVP, or DSS require the immediate supervisor to change the assigned duties to accord with the existing classification. The Form 613 will be approved or denied by the President and returned to the Personnel Office for appropriate disposition.

No announcement should be made to either the incumbent or his or her supervisors regarding the outcome of the classification review process at any stage after the Personnel Office has initiated a Form 613 until action has been taken by the President. When the President has acted on the classification, it will be the responsibility of the immediate line supervisor to inform the employee currently occupying the position about the outcome of the position classification review.

CLASSIFICATION APPEAL PROCESS

An incumbent has the right to appeal the findings of a classification review by the Personnel Office. Such an appeal must be filed with the Personnel Office no later than ten (10) days after the immediate supervisor has

informed the incumbent, in writing, that the Personnel Office has determined that the duties and responsibilities assigned are encompassed by the existing position classification.

The appeal of the Personnel Office findings shall include a detailed statement by the incumbent indicating the reasons for disagreement with the classification review determination. The incumbent shall provide a copy of the appeal to the immediate line supervisor.

A designated administrator in the Personnel Office will hold a meeting with the employee no later than twenty-one (21) days after the classification review appeal is filed. The designated administrator should not be the same person who conducted the initial classification review. This administrator will respond in writing to the employee no later than twenty-one (21) days after the meeting with the employee. Such a response shall be final.

Classification review, procedures are not subject to grievance.