

## UC DAVIS CLASSIFICATION REVIEW GUIDELINE

### THE FOLLOWING INFORMATION WILL ENSURE AN EFFECTIVE REVIEW

**Summary:** Staff positions are classified based on the duties and responsibilities assigned and exercised. As duties and responsibilities change, a position *may* need to be reclassified.

#### Reclassification Checklist

The following criteria are appropriate considerations for reclassification review:

- The position has undergone significant changes in level of responsibility since last reviewed.
- The position has changed in the nature, variety, and difficulty of work.
- The position has changed in the supervision received.
- The position has changed in the supervision exercised.
- More than 50% of a position's responsibilities are at another (i.e., higher, lower) level.
- The position (not the person) is being reclassified for bona fide business reasons.
- Employees typically retain 30% of their prior duties.

Reclassification is not appropriate when the issue is:

- longevity.
- workload.
- performance.
- salary increase.
- retention (currently seeking promotional opportunities elsewhere on campus).

**Managers/Supervisors:** In an effort to expedite the review of a position - explain the functions, tasks, and requirements of the position clearly, so that any external reviewer can easily understand the position. When preparing the reclassification request, you should provide the following:

- A cover memo outlining what is being requested and why.
- An updated position description ensuring that the functional areas and the skills, knowledge, and abilities (SKA) are listed in order of importance. Ensure that one or more SKA are associated with each job function listed. Do not include SKA's that are not required for specific functional areas identified.
- A current organizational chart indicating direct reporting responsibilities with solid lines and indirect reporting responsibilities with dashed or dotted lines. For each position, include the person's name, title, and FTE. Also, for any employees in the same work group (i.e., business office, computing center, field station, etc.), include the positions working title or a very brief description (a few words or phrases) of the functional responsibilities for each person.

Consider the following to ensure that adequate clarifying information is provided in your classification review request. Include as much detail as needed to explain the changes in the position as well as your justification for requesting a change in classification.

Provide information only on any of the following that may be applicable.

- What prompted the changes to the position and the request for classification review (i.e., staffing changes due to retirement, resignation, new program, etc.)?
  - Identify specific changes in the organizational structure as a result of the change in functions or responsibilities for this employee (i.e., reporting relationships, adding staff, reducing staff, etc.).
- What major changes in duties and responsibilities have occurred?
- What primary areas of responsibility are assigned to the position now?
  - Identify the responsibilities that have been added, removed, expanded, or evolved (include effective dates if applicable).
  - Quantify (i.e., budget, FTE, faculty, staff, etc.) wherever possible.
- What skills and knowledge are required to perform assigned duties?
  - Provide example(s) that best exemplify the position's level of authority, independence, innovation, and/or special skill requirements.
- Who performed these job duties in the past or, if removed, who will perform them in the future?
- What is the relationship of this position to others in the unit?
- Is this a supervisory position (i.e., more than one career FTE subordinate assigned)?

- To be designated a *Supervisor*, incumbents must exercise at least three of the six supervisory functions listed in the Supervisor Guidelines  
[http://www.hr.ucdavis.edu/Comp/Guidelines/Supervisor\\_Guidelines](http://www.hr.ucdavis.edu/Comp/Guidelines/Supervisor_Guidelines).
- How does this position compare to similar positions elsewhere?
  - Identify other positions in your department or on campus that you believe are comparable. Provide the name(s), classification(s) and department(s) of the incumbent(s).
- Did you use an existing position description from your or another department when creating or revising this one? If yes, PROVIDE A COPY and/or EXPLAIN which parts you used.
- What other positions, if any, are being considered for immediate or future reclassification or recruitment?

**Classification review requests are processed** by Human Resources Compensation Services, except where such authority is specifically delegated. (Your department HR unit can tell you where your request would be reviewed.).

**HR professionals trained in position classification analyze classification requests** to ensure consistent application of classification standards. The analysis includes:

1. Review of the information provided in the cover letter provided by the requester.
2. Comparison of new position descriptions with previous position descriptions, class specification and series concepts, other UCD position descriptions and considers external comparisons, where appropriate.
3. Clarifying information by contacting the supervisor, and, if appropriate - the employee, the department HR contact, the department head, or other subject matter experts.

**Additional information for consideration:**

1. If approved, reclassifications (upward and lateral) are effective on the first of the month after receipt of a completed package requesting classification review by the appropriate HR professional.
2. An upward reclassification assigns an employee's current position to a new payroll title with a higher salary range maximum, based on a change in duties. Employees typically retain at least 30% of their prior job duties in order to be considered appropriate for reclassification. Classification review may result in a higher, lower, or lateral classification change.
3. A reclassification action is different from a promotion, because a promotion to a completely different position requires an employee to apply and be selected for a position with a higher grade and salary range maximum.
  - a. Departments cannot fill a vacant position at a higher level by reassigning the duties to an employee at a lower level and submitting the action as a reclassification if they intend on filling the lower level position through recruitment. If there is a vacant position and a department elects not to fill it by restructuring, contact Human Resources prior to making reassignments to ascertain whether a recruitment or reclassification is appropriate.
4. In consideration of UCD's commitment to Equal Employment Opportunity, ensure that all employees in similar job classifications have equal access to training and work experience so that new duties are assigned in a fair and legally defensible manner.

<http://www.hr.ucdavis.edu/Comp/topic> includes links to every topic in the Compensation Services website. If you do not see the topic you seek, please telephone (530) 752-9926.