



# A CASE STUDY OF RECLASSIFICATION EFFORTS AT UNIONIZED INSTITUTIONS

Reclassification can help financial aid offices attract and retain skilled staff, improve efficiency, and ensure roles align with institutional needs. However, unionization can impact **reclassification efforts** by adding extra steps, requiring union approval for job titles or salary changes, and limiting the ability of management to make unilateral decisions about staffing structures. Read more about our overall work on reclassification at [nasfaa.org/reclassification](https://nasfaa.org/reclassification)<sup>1</sup>.

*This case study summarizes the interviews on reclassification efforts at three unionized institutions and provides practical insights to help directors navigate the process effectively.*

## KEY DRIVERS AND COMMON PRACTICES FOR RECLASSIFICATION

### Challenges in Reclassification at Unionized Institutions

- **Lengthy and Bureaucratic Approval Processes** — Directors consistently found that reclassification efforts in a unionized environment took significantly longer than at non-union institutions. The process involved multiple layers of approval, often including HR, union representatives, and classification committees, which slowed decision-making.
- **Vacant Positions as the Only Path to Reclassification** — Since reclassifying an occupied position was highly difficult, many directors found that the only feasible way to update job titles or salaries was to wait for a position to become vacant, then rewrite the job description before rehiring. This workaround was widely used to address inefficiencies and reclassify roles despite union constraints.
- **Union Agreements Limited Salary Adjustments** — Directors found that salary adjustments were often minimal or required additional justification, even when they successfully reclassified a role. Pay increases were typically restricted to what was negotiated within the collective bargaining agreement (CBA), leaving little room for flexibility.

### Union Involvement and Its Impact on Reclassification

- **Unions Played a Major Role in Job Classification Reviews** — In some cases, unions had significant influence over the structure of job classifications, sometimes even working directly with HR to shape the reclassification process. However, this did not always align with what financial aid leadership wanted, mainly when classifications were based on outdated job descriptions.
- **Pushback on Reclassification Decisions** — At times, unions resisted reclassification changes if they perceived them as unfair to existing employees or as a way to circumvent negotiated agreements. Directors had to balance advocating for needed changes while ensuring compliance with union policies.
- **Unionized Reclassification Efforts Often Took Years** — Many directors described multi-year timelines for reclassification efforts, with ongoing negotiations, employee appeals, and leadership transitions further extending the process.

### Strategies Directors Used to Navigate the Unionized Environment

- **Leveraging Technical Skills for Higher Pay** — Some directors successfully reclassified positions by emphasizing the technical nature of specific roles, such as business analysts or compliance specialists. This allowed them to justify higher salary bands under union agreements without direct negotiation.



*Having a union involved can make reclassification much more difficult because the union represents a different set of interests than the institution itself. Sometimes, even if clear industry data supports a change, the union may push back based on local concerns that don't align with broader workforce trends.*

**Director of Financial Aid  
at a unionized institution.**

<sup>1</sup> This summary was written with the assistance of generative AI, 2025.

- **Gathering Benchmarking Data to Support Reclassification** — Directors strengthened their proposals by comparing job roles and salaries at peer institutions, using external salary studies to justify changes within the constraints of the union agreement.
- **Framing Reclassification as Office-Wide Restructuring** — Instead of focusing on individual promotions, directors framed reclassification as necessary to align with institutional goals. This broader approach sometimes helped gain union support and reduced pushback from HR.
- **Reclassification within unionized environments** proved to be a complex and time-intensive process, requiring strategic planning, patience, and collaboration with HR and union representatives. Directors succeeded by finding creative ways to work within union agreements while advocating for staff needs.

## SPECIFIC EXAMPLES OF RECLASSIFICATION EFFORTS

**Creating a New Position to Circumvent Lengthy Reclassification Delays:** A director needed to increase a staff member's salary but could not reclassify the existing position due to union constraints. Instead, they created a new, non-union position and had the employee apply for it as a workaround to secure higher pay.

**Reclassifying a Role by Emphasizing Technical Responsibilities:** To justify a classification and salary increase under union guidelines, a financial aid office successfully reclassified an administrative role into a technical specialist position, highlighting the increased complexity of job duties and the required expertise.

**Rewriting Job Descriptions to Align with Union Agreements:** One institution worked closely with HR and the union to rewrite financial aid counselor job descriptions to reflect expanded responsibilities. This helped them secure higher pay grades for counselors without violating collective bargaining agreements.

**Using Vacant Positions to Adjust Staff Classifications:** Since reclassifying occupied positions was difficult, a financial aid office waited for a vacancy and rewrote the job description to better reflect the skills and responsibilities needed before hiring a replacement. This allowed them to work within union rules while updating job classifications.

## NEXT STEPS:

### Applying These Lessons to Your Institution

- Reclassification is a complex but valuable process for financial aid offices seeking to align job roles, responsibilities, and compensation with institutional needs. While this case study highlights real-world experiences from unionized institutions, successfully implementing reclassification requires strategic planning, collaboration with HR, and strong advocacy.
- Explore our [Tips and Resources for Reclassification](#) document for practical strategies, key considerations, and resources to guide your reclassification efforts. This companion guide provides actionable steps financial aid directors can take, including how to justify a reclassification request, navigate institutional processes, and manage staff expectations.
- Visit NASFAA's [Career Awareness Toolkit](#), a comprehensive resource developed to help promote financial aid as a profession. The toolkit includes templates, outreach materials, and strategies to help raise awareness of the financial aid profession on campus and beyond

### For Employees Seeking Reclassification

If you are an employee looking to advocate for your reclassification — whether for a title change, salary adjustment, or better alignment of responsibilities — we have developed a dedicated guide to help you navigate the process. This resource provides practical steps to assess your role, gather supporting documentation, and approach your supervisor with a well-prepared request. For detailed guidance, access our [Employee Reclassification Guide](#).



*Reclassification requests within the college were sitting for two years because they had to go through HR and the union for review. In that time, staff would come and go, and sometimes, people left before their requests were even considered.*

**Director of Financial Aid at a unionized institution.**



*The process took much longer than expected because HR couldn't easily increase pay bands—it was all tied to items negotiated by the union. Ultimately, we had to create a new position and have the staff member apply for it to get them the salary they deserved.*

**Director of Financial Aid at a unionized institution.**



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