



TIPS AND RESOURCES FOR RECLASSIFICATION

Reclassification can help financial aid offices attract and retain skilled staff, improve efficiency, and ensure roles align with institutional needs. This document provides tips for starting a reclassification based on interviews at 25 postsecondary institutions representing all higher education sectors. It aims to provide practical insights to help directors navigate the process effectively. Read more about our overall work on reclassification at nasfaa.org/reclassification¹.



TIPS FOR RECLASSIFICATION



PLANNING AND STRATEGY

- *Align reclassification with institutional priorities* – Framing changes in student success, retention, or operational efficiency makes leadership more receptive.
- *Take advantage of leadership transitions* – New leadership often creates opportunities to propose changes that might not have been possible.
- *Anticipate future organizational needs* – Regularly assess institutional trends, budget cycles, and strategic initiatives so you're prepared to propose reclassification when the right opportunity arises.
- *Leverage job vacancies to restructure* – Reclassification is easier when positions are vacant, as changing an occupied role can be met with institutional resistance.
- *Understand the classification system early* – Knowing HR's job classification structures and salary bands from the outset can help shape a more realistic plan.
- *Start small if needed* – If full-scale reclassification isn't feasible, begin with a pilot effort or a specific job category and expand later.



NAVIGATING HR AND INSTITUTIONAL POLICIES

- *Work closely with HR* – Having HR as a partner instead of an obstacle can speed up approvals and clarify what is possible.
- *Build your justification* – Several institutions have leveraged external benchmarking and peer salary data to advocate for necessary adjustments.
- *Unionized environments require patience* – Expect lengthy approval processes and focus on using vacant positions to make necessary changes.
- *Budget cycles determine timing* – Some directors could only secure salary adjustments during specific budget review periods, requiring careful planning.
- *Use salary studies as a catalyst* – Many directors took advantage of institution-wide salary reviews to push for reclassification adjustments.



MANAGING STAFF EXPECTATIONS

- *Be transparent when possible* – Regular communication helps staff understand the process, though some institutions restrict what directors can share.
- *If details can't be shared, focus on career growth* – Emphasizing long-term development and future opportunities helped maintain trust.
- *Prepare staff for long wait times* – Employees need to know that reclassification is rarely a quick process and may require multiple levels of approval.
- *Reclassification isn't always a promotion* – Some staff assumed reclassification meant automatic salary increases, which required managing expectations.

¹ This summary was written with the assistance of OpenAI, 2025.



JUSTIFYING SALARY AND POSITION ADJUSTMENTS

- *Benchmark against peer institutions* – Using salary data from similar schools made it easier to justify pay increases.
- *Tie salary increases to retention concerns* – Directors who demonstrated how staff were leaving for better-paying jobs were more successful in securing adjustments.
- *Highlight increasing job complexity* – Reclassification efforts that emphasized financial aid professionals' growing demands and responsibilities were more successful.



OFFICE RESTRUCTURING AND ROLE ADJUSTMENTS

- *Clarify job descriptions* – Many institutions found outdated job descriptions created barriers to fair compensation and role expectations.
- *Use reclassification to create career pathways* – Some institutions developed structured career progression models, clarifying what was required for promotion.
- *Avoid classification inconsistencies* – Some institutions found that employees with similar responsibilities were classified differently, creating inequities that needed correction.
- *Encourage staff participation in restructuring* – Involving staff in discussions about job roles led to better acceptance of classification changes.

These tips, drawn from financial aid directors' experiences across all institution types, reflect the challenges, strategies, and best practices for leading successful reclassification efforts.



COMMONLY USED RESOURCES FOR RECLASSIFICATION

Based on the interviews, financial aid directors used a range of internal, external, and peer benchmarking resources to support their reclassification efforts. Below are the key resources they cited:

INSTITUTIONAL AND HR RESOURCES

- *Internal salary data and job classification systems* – Many directors worked with HR to access internal job descriptions, pay bands, and past salary reviews to understand how roles were classified.
- *Employee satisfaction and retention surveys* – Data from institutional surveys helped make the case for reclassification by highlighting job dissatisfaction and turnover rates.
- *Budget and finance reports* – Reviewing institutional budgets helped directors determine when and how salary adjustments could be proposed.

PEER AND INDUSTRY BENCHMARKING

- *Salary data from peer institutions* – Directors frequently contacted similar schools to compare job structures, titles, and salaries. Some used public salary databases from institutions that are required to disclose pay information.
- *Networking with colleagues at other institutions* – Informal conversations and professional networks helped directors gather information on best practices and strategies for reclassification.

THIRD-PARTY SALARY AND WORKFORCE DATA

- [*NASFAA Staffing Model*](#) – Some directors referenced NASFAA’s staffing model to compare ideal staffing levels and salary ranges for financial aid offices.
- [*CUPA-HR Salary Data*](#) – The College and University Professional Association for Human Resources (CUPA-HR) database was widely cited as a critical source for salary benchmarking in higher education.
- [*State and regional workforce reports*](#) – Some directors relied on publicly available labor market data, such as Borderplex Workforce Solutions, to assess local salary benchmarks and cost-of-living adjustments.
- [*Indeed and Glassdoor salary estimates*](#) – While not as authoritative as HR-managed databases, some institutions reviewed self-reported salary data for a general sense of pay competitiveness.

UNION AND POLICY-DRIVEN RESOURCES

- [*Collective bargaining agreements \(CBAs\)*](#) – At unionized institutions, reclassification efforts had to align with existing CBAs, which defined pay scales, promotion structures, and approval processes.
- [*Legal and state requirements*](#) – In some cases, reclassification was guided by state labor laws, which dictated minimum salary levels and public salary disclosure policies.



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](#).

These resources were crucial in justifying salary adjustments, navigating HR approval processes, and advocating for reclassification changes.



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