

BEFORE THE PERSONNEL RESOURCES BOARD
STATE OF WASHINGTON

CENTRAL WASHINGTON UNIVERSITY,

Appellant,

vs.

KRISTINA OWENS,

Respondent.

CASE NO. R-ALLO-07-015

ORDER OF THE BOARD
FOLLOWING HEARING ON
EXCEPTIONS TO THE
DETERMINATION OF THE DIRECTOR

Hearing on Exceptions. This appeal came on for hearing before the Personnel Resources Board, MARSHA TADANO LONG, Vice Chair and JOSEPH PINZONE, Member, on Central Washington University's exceptions to the director's determination dated July 31, 2007. The hearing was held at the office of the Personnel Resources Board in Olympia, Washington, on December 6, 2007.

Appearances. Appellant Central Washington University (CWU) was represented by Shane Esquibel, Assistant Attorney General. Respondent Kristina Owens was represented by Elyse Maffeo, Assistant General Counsel for the Public School Employees of Washington.

Background. Ms. Owens' position was allocated to the class of Secretary Senior. On December 21, 2005, she submitted a Position Review Request Form requesting that her position be reallocated to a higher classification. On May 10, 2006, CWU informed Ms. Owens that her position was properly allocated. On June 5, 2006, Ms. Owen's requested a director's review of her position.

On April 24, 2007, Teresa Parsons, the director's designee, conducted a review of Ms. Owens' position. By letter dated July 31, 2007, Ms. Parsons determined that Ms. Owens' position should be reallocated to the Administrative Assistant A classification.

1 On August 30, 2007, CWU filed exceptions to Ms. Parson's determination. CWU's exceptions are
2 the subject of this proceeding.

3
4 At the time of her request for reallocation, Ms. Owens worked in the Communications
5 Department located within the College of Arts and Humanities. Ms. Owens reported to the Chair
6 of the department who reported to the Associate Dean of the College of Arts and Humanities.
7 The Associate Dean reported to the Dean. The Chair of the Communications Department is
8 responsible for that department alone while the Associate Dean has responsibility for all eight
9 departments located within the College.

10
11 Ms. Owens duties are in support of the Chair of the Communications Department and the
12 department's daily operations. Her duties include:

- 13 • independently overseeing office operations and overseeing the work of
14 student employees with overlapping shifts who perform a variety of clerical
duties and special projects for faculty members;
- 15 • acting as backup to the Business Manager in regard to entering payroll data;
- 16 • performing budget and office management duties related to expenditure,
17 purchasing, and payroll control;
- 18 • monitoring the budget;
- 19 • coordinating with the academic scheduling center to get curriculum,
classroom and faculty scheduling completed for the department;
- 20 • making decisions regarding office administration and operations; and
- 21 • working with the department chair and faculty on special projects like
22 planning and organizing seminars and arranging travel for guest speakers.

23
24 **Summary of CWU's Arguments.** CWU argues that Ms. Owens' position does not fit the class
25 series concept for the Administrative Assistant A classification because the Communications
26 Department is not a major organizational unit such as a school, college or major academic or
27 administrative department as anticipated by the class series concept. Rather, CWU asserts that the
28 Communications Department is a relatively small academic department within the College of Arts
29 and Humanities. CWU argues that Ms. Owens' position impacts only the Communications

1 Department and not a major organization with a combination of functional areas. CWU contends
2 that Ms. Owens' duties, responsibilities and scope of impact are best described by the Secretary
3 Senior classification.

4
5 **Summary of Ms. Owens' Arguments.** Ms. Owens explained that she has worked for the
6 Communications Department for eight years and during the past few years, she has taken on
7 additional and more complex duties and responsibilities. Ms. Owens contends that her position is
8 more administrative than clerical in nature and asserts that the Communications Department should
9 be considered a major organizational unit for purposes of the Administrative Assistant A class series
10 concept. Ms. Owens argues that the director's designee appropriately weighed her duties and
11 responsibilities and determined that her overall scope of work and level of responsibility supported
12 reallocation of her position. Ms. Owens asserts that scope of duties and level of responsibilities of
13 her position are best described by the Administrative Assistant A classification.

14
15 **Primary Issue.** Whether the director's determination that Appellant's position is properly allocated
16 to the Administrative Assistant A classification should be affirmed.

17
18 **Relevant Classification.** Secretary Senior class code, 100O, and Administrative Assistant A, class
19 code 2045.

20
21 **Decision of the Board.** The purpose of a position review is to determine which classification
22 best describes the overall duties and responsibilities of a position. A position review is neither a
23 measurement of the volume of work performed, nor an evaluation of the expertise with which
24 that work is performed. A position review is a comparison of the duties and responsibilities of a
25 particular position to the available classification specifications. This review results in a
26 determination of the class that best describes the overall duties and responsibilities of the
27 position. See Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

1 The class series concept for the Administrative Assistant A classification states:

2 Provide support to the chief administrator or head of a major organizational unit such
3 as a school, college or major academic or administrative department in a
4 combination of functional areas such as budget development and/or management,
5 grant and contract proposal preparation, space planning and analysis, expenditure
6 control, student services, executive secretarial support, office management, public
7 relations, personnel administration, curriculum planning/analysis, records
8 management and/or report preparation.

9 This series differs from the office support series in that Administrative Assistants
10 report to the head of a major organizational unit and perform and/or coordinate
11 administrative support functions for the entire unit, develop and establish procedures
12 and apply policies for the unit.

13 Administrative Assistants differ from Administrative Services Managers because the
14 former do not have management responsibility for a department or unit, but rather
15 provide or oversee staff support for an administrator who has ultimate management
16 responsibility.

17 The basic function for the Administrative Assistant A classification states:

18 Provide staff support to the chief administrator or head of a major organizational unit
19 such as a school, college or major academic or administrative department. Represent
20 the administrator and/or unit's goals and interests and provide and/or coordinate
21 functions such as budget and space management/analysis, grant and contract
22 proposal preparation, records management, student services and/or personnel
23 administration.

24 Ms. Owens performs duties encompassed by the class series concept and basic function of the
25 Administrative Assistant A classification. For example, she performs budget management duties
26 such as monitoring, reconciling, initiating, and approving expenditures assisting the Chair with
27 budgeting and allocating monies within the department; prepares quarterly Contract Request
28 forms for Adjunct Instructor contracts; provides secretarial support to the Chair; performs public
29 relations functions; and performs administrative functions such as developing and maintaining
procedures, recordkeeping, and preparing reports. But for the organizational structure of the
College of Arts and Humanities and the Communications Department, allocation to this
classification may be appropriate.

1 However, at the time of Ms. Owens' request for reallocation, she reported to a department chair. She
2 did not report to a chief administrator or head of a major organizational unit as envisioned by the
3 class series concept and the basic function of the Administrative Assistant A classification. This
4 classification describes positions with a much broader scope of influence and breadth of impact than
5 Ms. Owens' position.

6
7 The Board previously addressed the allocation of a position to the Administrative Assistant A
8 classification in Boekhoff v. Bellevue Community College, Case No. R-ALLO-07-002 (2007). In
9 Boekhoff, the appellant provided administrative support to the Director of Campus Operations.
10 Campus Operations included custodial services, capital programs, grounds, public safety,
11 maintenance, material resources and the mail room, campus operations and campus events. The
12 Board concluded that the level and scope of the appellant's duties and responsibilities were best
13 described by the Administrative Assistant A classification.

14
15 Unlike the appellant in Boekhoff, Ms. Owens' position provides support to the Communications
16 Department only. She does not provide support to multiple divisions or units within the
17 department. Ms. Owen's position does not exercise the scope of influence and breadth of impact
18 encompassed by the Administrative Assistant A classification.

19
20 The class series concept for the Secretary classifications states, in part:

21 Positions in this category provide a variety of clerical services and/or secretarial
22 duties in support of a work unit, department, supervisor(s), staff members, and/or
23 general day-to-day office operations. Services provided and duties performed
24 include functions such as the creation, storage, retrieval, mailing, and posting of
25 documents, data, and records, providing assistance to others in direct support of
26 the work, providing information to others about services available, assisting
27 customers with access to services, updating web sites, preparing typed
28 documents, screening calls and visitors, making travel arrangements, scheduling
29 meetings and/or classes, taking notes and transcribing minutes, keeping
supervisor's and/or staff member's calendar(s) and committing supervisor's
and/or staff member's time.

Ms. Owens' position fits within this concept. She provides support to the department chair and assistance to others in direct support of the department. She oversees the day-to-day operations of the department, provides information to others about the operations and offerings of the department, maintains the department's website, prepares documents such as brochures and forms, makes travel arrangements for guest speakers, schedules presentations, meetings and classes, and commits her supervisor's and others' time.

The distinguishing characteristics of the Secretary Senior classification state:

Perform complex secretarial duties such as independently planning, organizing and prioritizing work, monitoring and evaluating budget(s) status and initiating corrections, developing travel itineraries, compiling reports, studies, and/or applications, developing, modifying, and/or maintaining data base management, office record keeping, or filing system(s), establishing office procedures, standards, priorities, and deadlines, and coordinating office operations. Positions initiate action to ensure work unit and/or office goals are met and have frequent contacts with clients, the public, staff members from other departments, students, and faculty.

Assignments and projects are of a complex nature. Independent performance of complex secretarial assignments requires substantive knowledge of a variety of regulations, rules, policies, procedures, processes, materials, or equipment. Problems are resolved by choosing from established procedures and/or devising work methods. Guidance is available for new or unusual situations. Deviation from established parameters requires approval. Work is periodically reviewed to verify compliance with established policies and procedures.

The Secretary Senior classification encompasses the majority and complexity of Ms. Owens' duties, level of responsibility, decision making authority and level of independence. While some of Ms. Owens' duties, such as preparing quarterly contracts for faculty, implementing grants and performing public relations functions could be considered higher level assignments, these duties do not constitute a majority of her overall duties and responsibilities.

While not allocating criteria, the examples of work for the Secretary Senior classification also encompass Ms. Owens' work. For example, she:

Resolves problems and responds to inquiries regarding procedures and services;

1 Establishes office procedures, standards, priorities, and deadlines;

2 Maintains, monitors, and evaluates budget or fiscal records; completes or
3 processes requisitions, invoices and payroll; identifies problems and initiates
4 corrections; assists in the development of organization budget;

5 Attends meetings on behalf of supervisor; represents supervisor in supervisor's
6 absence;

7 Relays messages and instructions from the supervisor to others;

8 Makes appointments; schedules and arranges meetings; makes room reservations;

9 Provides information related to planning, organizing and operation of the
10 department;

11 Makes travel arrangements and maintains records of travel itineraries; and

12 Orders supplies, equipment, printing, and arranges for facility and equipment
13 maintenance and repair contracts and services.

14 Most positions within the civil service system occasionally perform duties that appear in more
15 than one classification. However, when determining the appropriate classification for a specific
16 position, the duties and responsibilities of that position must be considered in their entirety and
17 the position must be allocated to the classification that provides the best fit overall for the
18 majority of the position's duties and responsibilities. Dudley v Dept. of Labor and Industries, R-
19 ALLO-07-007 (2007).

20 In Allegri v. Washington State University, PAB Case No. ALLO-96-0026 (1998), the Personnel
21 Appeals Board (predecessor to this Board) addressed the concept of best fit. The PAB noted that
22 while the appellant's duties and responsibilities did not encompass the full breadth of the duties
23 and responsibilities described by the classification to which his position was allocated, on a best
24 fit basis, the classification best described the level, scope and diversity of the overall duties and
25 responsibilities of his position.

26 In this case, the Secretary Senior classification best encompasses the level, scope and diversity of
27 Ms. Owens' overall duties and responsibilities.

1 This decision is based on the duties and responsibilities of Ms. Owens' position during the six
2 months prior to December 21, 2005. If she feels that her duties have changed since that time, she
3 may request a review of her current duties and responsibilities in accordance with CWU's
4 procedures. In addition, we suggest that CWU review the level and scope of work assigned to Ms.
5 Owens' position to assure that her duties continue to be consistent with the Secretary Senior
6 classification. If CWU finds that Ms. Owens is performing work outside of the Secretary Senior
7 classification, CWU should reallocate her position to the appropriate classification or realign the
8 duties assigned to the position to assure that the majority of the work performed by the position fits
9 within the Secretary Senior classification.

10
11 In a hearing on exceptions, the appellant has the burden of proof. WAC 357-52-110. Appellant
12 CWU has met its burden of proof.

13
14 **ORDER**

15 NOW, THEREFORE, IT IS HEREBY ORDERED that the appeal on exceptions by Central
16 Washington University is granted and the director's determination dated July 31, 2007, is reversed.

17
18 DATED this ____ day of _____, 2008.

19 WASHINGTON PERSONNEL RESOURCES BOARD

20
21 _____
22 MARSHA TADANO LONG, Vice Chair

23
24 _____
25 JOSEPH PINZONE, Chair