

BEFORE THE PERSONNEL RESOURCES BOARD  
STATE OF WASHINGTON

EILEEN SHARP,

Appellant,

vs.

DEPARTMENT OF REVENUE,

Respondent.

CASE NO. R-ALLO-08-008

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, Chair; JOSEPH PINZONE, Vice Chair; and LAURA ANDERSON, Member, on Appellant's exceptions to the director's determination dated April 4, 2008. The hearing was held at the office of the Personnel Resources Board in Olympia, Washington, on July 17, 2008.

**Appearances.** Appellant Eileen Sharp appeared by telephone and was represented by Dave Schiel, Washington Public Employees Association Staff Representative. Mr. Schiel also appeared by telephone. Respondent Department of Revenue was represented by Dorothy Hibbard, Senior Human Resource Consultant.

**Background.** Appellant's position was allocated to the class of Office Assistant 3. She requested that Respondent reallocate her position to the Secretary Administrative classification. By letter dated January 5, 2007, but mailed January 18, 2007, Respondent informed Appellant that her position was properly allocated. On February 20, 2007, Appellant requested a director's review of her position.

On January 3, 2008, Teresa Parsons, the director's designee, conducted a review of Appellant's position. During the director's review, Appellant asked that her position be reallocated to the

1 Secretary Senior classification. By letter dated April 4, 2008, Ms. Parsons determined that  
2 Appellant's position was properly allocated to the Office Assistant 3 classification.

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4 On May 2, 2008, Appellant filed exceptions to director's determination. Appellant's exceptions are  
5 the subject of this proceeding.

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7 Appellant works in the Department of Revenue's Spokane Field Office. She reports to the Field  
8 Audit Manager. In part, Appellant provides general support and receptionist duties for the audit  
9 staff located in Spokane. During the director's review, Appellant described her duties as:

- 10 • 25% Proofreading and processing audits
- 11 • 20% Data entry
- 12 • 20% General office support to include correspondence, filing, and other related duties
- 13 • 15% Travel arrangements
- 14 • 15% Office purchasing and space management
- 15 • 5% Supervisory liaison: serving as a conduit for information from the supervisor to the  
16 audit staff and vice versa

17 **Summary of Appellant's Arguments.** Appellant argues that the duties contained in the Office  
18 Assistant 3 (OA3) and the Secretary Senior classes contain many similarities. As a result, Appellant  
19 acknowledges that 80% of her duties fit the OA3 class, but she asserts that more of her duties, 90%,  
20 fit the Secretary Senior class. Appellant asserts that her responsibilities for making travel  
21 arrangements and her role as liaison between her supervisor and staff are higher level duties and best  
22 fit within the Secretary Senior classification. Appellant asserts that she functions as the secretary for  
23 her whole unit, including her supervisor, and that the majority of her duties fit within the Secretary  
24 Senior classification. Therefore, Appellant contends that her position should be reallocated.

25 **Summary of Respondent's Arguments.** Respondent argues that about 95% of Appellant's duties  
26 fit within the OA3 classification. Respondent contends that Appellant does not develop travel  
27 itineraries as anticipated by the Secretary Senior level but rather the auditors coordinate their  
28 itineraries while Appellant makes their flight reservations. Respondent further contends that

Appellant does not make decisions for her supervisor or the auditors; rather she acts as a conduit for information by delivering messages on their behalf. Respondent asserts that the overall scope of Appellant's duties is described by the OA3 classification.

**Primary Issue.** Whether the director's determination that Appellant's position is properly allocated to the Office Assistant 3 classification should be affirmed.

**Relevant Classification.** Secretary Senior, class code 100T, and Office Assistant 3, class code 100J.

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

The class series concept for the Secretary classification states:

In support of a supervisor and/or staff members, provides secretarial services and assistance for the purpose of facilitating the supervisor's and/or staff members' own work and relieving the supervisor and/or staff members of day-to-day clerical detail. Applies knowledge of supervisor's and/or staff members' work commitments including status of projects and nature of contacts. Secretarial duties include making travel arrangements, scheduling meetings, taking notes and transcribing minutes, screening calls and visitors, keeping supervisor's and/or staff members calendar(s) and committing supervisor's and/or staff members' time.

The definition 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,

1 office record keeping, or filing system(s), establishing office procedures,  
2 standards, priorities, and deadlines, and coordinating office operations. Positions  
3 initiate action to ensure work unit and/or office goals are met and have frequent  
4 contacts with clients, the public, staff members from other departments, students,  
5 and faculty.

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

13 While some of Appellant's duties appear to fit within the class series concept and definition of the  
14 Secretary Senior classification, her overall duties do not have the depth and breadth of  
15 responsibilities found at this level. For example, she does not take notes and transcribe minutes,  
16 keep her supervisor's and/or staff members' calendar(s), and commit her supervisor's and/or  
17 staff members' time. She does not monitor and evaluate budget(s) and initiate corrections,  
18 establish office procedures, standards, priorities, and deadlines, or coordinating office  
19 operations. She does not screen calls and visitors; rather she acts as the receptionist for the  
20 office, takes messages and relays information. She does not developing travel itineraries; rather  
21 the auditors develop their itineraries and Appellant makes airline and rental car reservations for  
22 them based on the information they provide to her. Appellant does not compile reports; rather  
23 she formats and proofs information provided by the auditors.

24 The class series concept for the Office Assistant classification states, "[p]erforms a variety of  
25 clerical duties in support of office or unit operations."

26 The definition of the Office Assistant 3 classification states:

27 Under general supervision, independently perform a variety of complex clerical  
28 projects and assignments such as preparing reports, preparing, reviewing, verifying  
29 and processing fiscal documents and/or financial records, composing correspondence  
such as transmittals and responses to frequent requests for information, establishing  
manual or electronic recordkeeping/filing systems and/or data base files, and  
responding to inquiries requiring substantive knowledge of office/departmental

1 policies and procedures. Positions may perform specialized complex word  
2 processing tasks in a word processing unit or complex rapid data inquiry and/or entry  
3 functions.

4 The distinguishing characteristics of the Office Assistant 3 classification state:

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

12 Positions typically provide work direction to lower level staff and may assist in  
13 training new staff.

14 Appellant's position fits with the class series concept, definition and distinguishing  
15 characteristics of the Office Assistant 3 classification. For example, she performs office support  
16 tasks including:

- 17 • preparing reports based on information provided by the auditors, which may require  
18 complex word processing;
- 19 • preparing purchasing orders for the office;
- 20 • composing correspondence;
- 21 • performing recordkeeping and filing; and
- 22 • responding to inquiries from staff and others.

23 In addition, as the only support person for her office, her work requires her to have a substantive  
24 knowledge of office policies, procedures and processes.

25 Appellant argues that she performs duties encompassed in the typical work statements for the  
26 Secretary Senior class. However, typical work statements are not allocating criteria. Rather they  
27 provide guidance on the level of work typically found in the various classes within the series.  
28 When allocating positions, the guidance provided in the (DOP) Classification and Pay  
29 Administrative Guide establishes that the following standards are primary considerations in  
allocating positions:

- a) Category concept (if one exists).
- b) Definition or basic function of the class.

- 1 c) Distinguishing characteristics of a class.  
2 d) Class series concept, definition/basic function, and distinguishing  
3 characteristics of other classes in the series in question.  
4 (See Jurgensen v. DOC, PRB Case No. R-ALLO-07-016 (2008).  
5

6 Furthermore, most positions within the civil service system occasionally perform duties that  
7 appear in more than one classification. However, when determining the appropriate classification  
8 for a specific position, the duties and responsibilities of that position must be considered in their  
9 entirety and the position must be allocated to the classification that provides the best fit overall  
10 for the majority of the position's duties and responsibilities. Dudley v Dept. of Labor and  
11 Industries, R-ALLO-07-007 (2007).  
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13 In this case, the Office Assistant 3 classification best encompasses the scope of duties and level of  
14 responsibilities assigned to Appellant's position.  
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16 In a hearing on exceptions, the appellant has the burden of proof. WAC 357-52-110. Appellant has  
17 not met her burden of proof.  
18

### 19 ORDER

20 NOW, THEREFORE, IT IS HEREBY ORDERED that the appeal on exceptions by Eileen Sharp is  
21 denied and the director's determination dated April 4, 2008, is affirmed and adopted.  
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23 DATED this \_\_\_\_ day of \_\_\_\_\_, 2008.  
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25 WASHINGTON PERSONNEL RESOURCES BOARD  
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27 \_\_\_\_\_  
28 MARSHA TADANO LONG, Chair  
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JOSEPH PINZONE, Vice Chair  
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LAURA ANDERSON, Member

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