
 JUDITH RIDDLE,
 Appellant,
 v.
 VERNE KNOLL, Deputy Director,
 Bureau of Personnel,
 Respondents.
 Case No. 77-8

OFFICIAL

OPINION AND ORDER

Before: DeWitt, Warren and Hessert, Board Members. Board Member Warren abstained.

NATURE OF THE CASE

This is an appeal of the denial of a reclassification request, pursuant to sec. 16.05(1)(f), stats. The issue to which the parties stipulated at the prehearing conference is:

"Whether or not the appellant's position, the duties and responsibilities of which are described in a position description dated 9/22/76 and marked respondents' exhibit 3 should be classified as Administrative Secretary 1 or Administrative Assistant 1? (It is understood that this statement of issue includes changes in the position that occurred prior to December 1, 1976.)"

FINDINGS OF FACT

The basic duties and responsibilities of appellant's position as set forth in the foregoing position description are not in dispute and are incorporated as findings of fact as follows:

"55% Work as technical coordinator in 51-board plan and budget preparation review process.* Forward approvals & changes to appropriate persons for final processing. Monitor board contracts, maintain federal grant data information & develop informational packets upon request. Develop, distribute and update all directories related to 51-boards & district/regional offices. Keep available & current sets of mailing labels for boards & DMH districts/regions. Draft & assist in development of Standard Operating Procedures for 51-board Administrative Manual. Also develop inter-bureau SOP's.

* This function was no longer performed by appellant as of the time of the hearing. However, it was considered by the personnel bureau in its rereview of the reclassification denial.

- 15% Coordinate, inform & deal with contacts within or outside the Department & with the general public regarding bureau & divisional matters. Maintain bureau files.
- 15% Scrutinize, type, reproduce and distribute all bureau correspondence. Prepare responses when appropriate. Keep district staff information & State map identifying DMH districts/regions available for distribution.
- 8% Represent the bureau on Affirmative Action-Civil Rights Committee & at other committees as assigned. Also attend Bureau Staff Meetings, when appropriate.
- 5% Total clerical support for Governor's appointed Advisory Committee on Community Program Standards & its staff.
- 2% Assist in other divisional assignments."

As a part of her duties, the appellant played a primary role in drafting instructions for forms related to the Division of Mental Hygiene administrative procedures for approving and monitoring 51-board contracted and operated services. These documents were published in manual form accompanied by a memorandum, also drafted by appellant, setting forth administrative procedures for the 51-board system contract process, and a standard operating procedure for contract receipt and review. See appellant's exhibits C-2 and C-3. Appellant helped develop these working closely with her immediate supervisor, the assistant director, bureau of community services, and based on goals he outlined.

The appellant does not make policy. She does from time to time assist local board staff in the interpretation of division directives that she worked on. She coordinates communications between the division and the boards. Examples of work in this area she performs are as follows:

She distributes to the boards and maintains a file on 51-board directives, and retrieves directives on request. She develops, promulgates, and maintains on an annual basis, a directory of local board staff. She collects salary data on board staff on a statewide basis, sets it out on a form, and distributes it. She assisted in the coordination of communications between

the boards and a research firm. She reviews contracts, which are submitted on a continuing basis by the boards, and extracts data from them for data processing purposes and does basic coding in this regard. She handles scheduling and other logistical aspects of orientation sessions conducted for new board employes.

The appellant has no supervisory or lead work functions and works under general supervision.

In denying appellant's reclassification request, the respondents relied in part on a comparison of appellant's duties and responsibilities to those of other positions classified as administrative assistant 1. See respondents' exhibits 6 and 7. The first position includes involvement in writing and compiling applications for federal assistance to state institutions and day care centers for the mentally handicapped and participation in negotiations for approval with DPI Title 1 staff. The second position includes responsibility for the DOT worker's compensation program. This involves some determinations of eligibility and amounts due and the development and implementation of processing procedures for handling claims. The position standards for Administrative Secretary 1 and Administrative Assistant 1 (respondents' exhibits 10 and 11) are attached to this opinion and incorporated by reference.

CONCLUSIONS OF LAW

The definition section of the position standards for these classifications are as follows:

"Positions allocated to this level perform administrative and supervisory clerical tasks under broad assignment of responsibility for program objectives." Administrative Secretary 1 (emphasis supplied).

"Positions allocated to this level perform responsible administrative and supervisory work* under administrative review. Positions

* Inasmuch as the respondents indicated at the hearing that supervisory functions were not considered a requirement for AA1 in their review of appellant's request, they are not considered further in this opinion.

allocated to this level develop and revise procedures affecting their program and make recommendations on revising policies affecting their program." Administrative Assistant 1 (emphasis supplied).

Differentiation between these classifications depends in large measure on a distinction between primarily clerical and primarily administrative functions. The appellant placed strong emphasis on her knowledge of the program which enabled her to answer questions from board staff and perform her coordinative and communicative functions. However, this is identified by the classification factors for Administrative Secretary 1. See respondents' exhibit 10:

"The tasks performed demand knowledge of organizational structure, work assignments, flow of work and procedural regulations among operating units.

"Judgments are made at this level which affect the work of others outside the immediate department.

"Frequent contact with other operating units within the department and with the general public in a coordinative or informative capacity is typical of this level.

* * *

"Positions at this level often develop and revise the operating procedures affecting their immediate work unit."

The position standards for AA1 (respondents' exhibit 11) include the following classification factors:

"Positions allocated to this level are responsible for developing and revising selected policies and procedures affecting the administration of their programs.

"Positions at this level typically devote more time to administration and supervision of a program than to the actual performance of clerical tasks."

The appellant does not have a role in policy-making. While she has developed and revised procedures, it is concluded that for the most part these procedures are clerical as opposed to administrative in nature. For example, appellant's work on the directory of board personnel, the board

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salary data compilation, and contract review may involve the exercise of initiative and judgment and require a basic knowledge of the operation of her unit, all as set forth in the Administrative Secretary 1 position standard, but these types of activities do not involve the kind of discretion found in the AA 1 positions reviewed by respondents which administer a worker's compensation claims program and which prepares applications and negotiates approval for federal Title 1 assistance.

ORDER

The action of the respondents denying appellant's request for reclassification is sustained and this appeal is dismissed.

Dated September 15, 1977.

STATE PERSONNEL BOARD


Laurene DeWitt, Chairperson