

STATE OF WISCONSIN

PERSONNEL COMMISSION

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KATHRYN SCHROTH,

Appellant,

v.

Administrator, DIVISION
OF PERSONNEL,

Respondent.

Case No. 79-PC-CS-935

* * * * *

DECISION
AND
ORDER

NATURE OF THE CASE

This is an appeal of respondent's decision to reallocate appellant's position. Appellant argues that she should have been reallocated to a Program Assistant 2 (PR 2-07) instead of a Typist-Lead (PR 2-06).

FINDINGS OF FACT

1. During the period in question, appellant was employed by the University Health Service of the University of Wisconsin-Stevens Point. On September 4, 1979 the appellant's position was reallocated from Typist 3 to Typist-Lead. The reallocation occurred as the result of a statewide survey of clerical positions conducted by the Division of Personnel.

2. With one exception, appellant's position description of February 1, 1979 accurately described the objectives and respective time allocation for the position. The exception is the failure of the position description to identify the appellant's role in overseeing the selection and hiring of a full-time receptionist for the University Health Service. A copy of the position description is attached hereto and incorporated

by reference as if fully set forth as a part of this finding.

3. The class descriptions for Typist-Lead and Program Assistant 2 provide:

"Typist (Lead)

This is lead clerical work of moderate difficulty in completing a variety of assigned clerical and typing tasks. Positions allocated to this class require typing proficiency as well as performance of leadwork responsibilities including work assignment and review of lower level personnel. A variety of secretarial functions may be performed at this level, but these would not constitute a majority of the position's time. Work is performed under general supervision.

Program Assistant 2

This is work of moderate difficulty providing program support assistance to supervisory, professional or administrative staff. Positions are allocated to this class on the basis of the degree of programmatic involvement, delegated authority to act on behalf of the program head, level and degree of independence exercised, and scope and impact of decisions involved. Positions allocated to this level are distinguished from the Program Assistant 1 level based on the following criteria: (1) the defined program area for which this level is accountable is greater in scope and complexity; (2) the impact of decisions made at this level is greater in terms of the scope of the policies and procedures that are affected; (3) the nature of the program area presents differing situations requiring a search for solutions from a variety of alternatives; and (4) the procedures and precedents which govern the program area are somewhat diversified rather than clearly established. Work is performed under general supervision."

4. The position standard for Program Assistant indicates that the position is based on duties in which discretion and decision making cannot be standardized.

5. In fulfilling the vast majority of the objectives set out in her position description, the appellant follows set procedures. She does not exercise the independent judgement and discretion that is the basis

for a classification as a Program Assistant.

6. Appellant's position is better described by the class description for Typist-Lead than for Program Assistant 2.

CONCLUSIONS OF LAW

1. This matter is appropriately before the Commission pursuant to §230.44(1)(a), Wis. Stats.

2. The appellant has the burden of proving that the respondent's decision to reallocate the appellant's position from Typist 3 to Typist-Lead was incorrect and that instead, her position should have been classified as Program Assistant 2.

3. The appellant has failed to meet that burden of proof.

4. The respondent's decision to reallocate appellant's position from Typist 3 to Typist-Lead was correct.

OPINION

Appellant's position did include some duties that rely upon the appellant's discretion. The best example is appellant's role in budget preparation. In addition, relatively small segments of some of appellant's remaining objectives also included discretion over decision-making. However, the appellant's position description shows that the majority of her time was occupied by duties of a clerical nature which were carried out according to standardized procedures. In addition, at least 18% to 20% of the appellant's time was spent typing.

Respondent introduced evidence of another position within the University of Wisconsin-Stevens Point that had been reallocated during

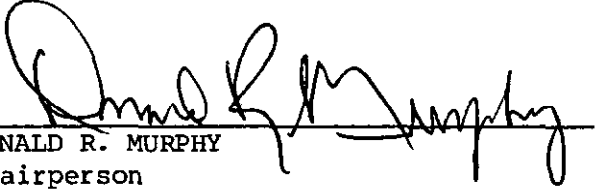
the clerical survey from a Typist 3 to a Typist-Lead. The particular position was used as a benchmark throughout Wisconsin for reallocation decisions. A comparison of appellant's position with the benchmark position produces only nominal discrepancies. As a result it is reasonable to conclude that when compared to comparable positions throughout the state, appellant's position is correctly classified.

ORDER

The respondent's reallocation decision is affirmed and appellant's appeal is dismissed.

Dated: Nov. 19, 1981.

STATE PERSONNEL COMMISSION


DONALD R. MURPHY
Chairperson

KMS:jmg

PARTIES

Kathryn Schroth
3313 Linwood Springs
Stevens Point, WI 54481

Charles Grapentine
149 East Wilson Street
Madison, WI 53702

POSITION DESCRIPTION

PERM ID (Rev. 11/77)

State of Wisconsin
Department of Administration
STATE BUREAU OF PERSONNEL

1. Position No.	2. Carry/Reclass Request No.	3. Agency No.
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NAME OF EMPLOYEE Kathryn K. Schroth	5. DEPARTMENT, UNIT, WORK ADDRESS University Health Service University of Wisconsin Stevens Point, WI 54481
CLASSIFICATION TITLE OF POSITION Typist Typist (Lim)	8. NAME AND CLASS OF FORMER INCUMBENT
CLASS TITLE OPTION (To be Filled Out By Personnel Office)	10. NAME AND CLASS OF EMPLOYEES PERFORMING SIMILAR DUTIES
AGENCY WORKING TITLE OF POSITION	12. FROM APPROXIMATELY WHAT DATE HAS THE EMPLOYEE PERFORMED THE WORK DESCRIBED BELOW? June 1, 1978
NAME AND CLASS OF FIRST-LINE SUPERVISOR Bill Hettler, M.D., Director, University Health Service	

DOES THIS POSITION SUPERVISE SUBORDINATE EMPLOYEES IN PERMANENT POSITIONS? Yes No IF YES, COMPLETE AND ATTACH A SUPERVISORY POSITION ANALYSIS FORM (AD-PERS-34).

POSITION SUMMARY - PLEASE DESCRIBE BELOW THE MAJOR GOALS AND OBJECTIVES OF THIS POSITION
The major goals and objectives of the above position are to provide the major administrative support for the University Health Service, provide the budgeting component to the University Health Service and assist the Health Service Director with personnel and correspondence matters.

DESCRIBE THE OBJECTIVES AND TASKS OF THIS POSITION (Please see sample format and instructions on back of last page.)

- OBJECTIVES: Describe the major achievements, outputs, or results. List them in descending order of importance
- TASKS: Under each objective, list the work activities performed to meet that objective.
- TIME %: Include for objectives and major tasks.

TIME%	OBJECTIVES AND TASKS
15%	A. Production of Typed Copy A1. Type letters, reports, memos, and minutes of meetings from typed or handwritten draft copy, dictaphone or other recordings A2. Type offset and ditto masters from rough draft A3. Type information onto forms, lists, envelopes, and labels
25%	B. Budget Work B1. Attend budget meetings to develop skills and information in order to be able to prepare annual budget of approximately \$400,000 B2. Prepare 5 year budgets for University Health Service B3. In the fall of the year work on budget revisions that may be necessary before submitting of final budget

SUPERVISORY SECTION - TO BE COMPLETED BY THE FIRST LINE SUPERVISOR OF THIS POSITION (See instructions on Back of last page)

- a. The supervision, direction, and review given to the work of this position is close limited general.
- b. The statements and time estimates above and on attachments accurately describe the work assigned to the position. (Please initial and date attachments.)

Signature of first-line supervisor _____ Date **2/1/78**

EMPLOYEE SECTION - TO BE COMPLETED BY THE INCUMBENT OF THIS POSITION

I have read and understand that the statements and time estimates above and on attachments are a description of the functions assigned my position. (Please initial and date attachments.)

Signature of employee _____ Date _____

Signature of Personnel Manager _____ Date _____

- B4. Keep bookkeeping records of expenditures and balances on department accounts.
 - B5. Keep a more accurate breakdown of supplies and service than that on the computer printout received monthly so that cost analysis of various aspects of the Health Service such as cost of pap and pelvi exams can be determined.
 - B6. Check office maintained records against computer printouts received
 - B7. Deposit money from supplies sold, lab work done, and that money that it received from the Lifestyle Assessment Questionnaire
 - B8. Initiate budget transfers as needed
 - B9. Inform supervisor as to status of accounts
 - B10. Determine projected expenditures
 - B11. Prepare charge backs.
 - B12. Maintain student employee records - monitor these records to insure that funds students were allotted are still available.
- 10% C. Preparation of Lifestyle Assessment Questionnaire
- C1. Maintain records for those questionnaires that have been received from students.
 - C2. Prepare the questionnaires for processing by the computer services center.
 - C3. Supervise preparation of questionnaire prior to distribution. Make sure questionnaires are decoded properly and mailed to on-campus students.
- 5% D. Composition of Written Communication
- D1. Write simple letters of acknowledgement and transmittal.
 - D2. Select and send proper form letters.
 - D3. Sign in behalf of supervisor correspondence
- 10% E. Supervision of Front Desk (receptionist) Position
- E1. Establish work routine for receptionist
 - E2. Assign work outside of established daily routine
 - E3. Answer questions and handle problems as they occur at front desk.
- 5% F. Supervision of student assistants
- F1. Interview, hire, or make recommendations to hire.
 - F2. Counsel, evaluate and discipline as needed.
 - F3. Terminate employment if necessary.
- 5% G. Distribution and preparation of mail
- G1. Open and route mail
 - G2. Attach all pertinent materials from files to incoming correspondence or supervise this process.
 - G3. Determine "class" of mail to be used.
 - G4. Supervise preparation of packages for shipping.
 - G5. Supervise preparation of bulk rate mailings.
- 10% H. Procurement and maintenance of supplies and materials for the office
- H1. Inventory office supplies.
 - H2. Check with others to determine supplies that will be needed.
 - H3. Check supply budget to insure availability of funds for supplies.
 - H4. Complete requisitions, purchase orders or printing order and route appropriate office.
 - H5. Maintain supply cabinet in neat and organized manner.
 - H6. Issue supplies.
- 5% I. Information Flow
- I1. Screen all phone calls regarding outside speaking engagements for director of department. Handle as many initial details as possible
 - I2. Receive/place telephone calls, provide routine information.
 - I3. Initiate calls to request necessary information.

5Z

J. Development and Maintenance of Files

- J1. Maintain mailing lists for various aspects of our service.
- J2. Key punch addresses onto IBM cards for easy maintenance of mailing lists.

5X

K. Preparation of Reports

- K1. Compile records and reports from numerical data. This would include doing the first draft of the annual report.
- K2. Compile data for various reports as needed.
- K3. Compute simple statistics such as percentages when such data is not available on computer printouts.
- K4. Gather, compile, write materials on budget justification.