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ANN McINTOSH,

Appellant,

v.

Administrator, DIVISION OF  
PERSONNEL, and  
President, UNIVERSITY OF  
WISCONSIN SYSTEM,

Respondents.

Case No. 81-442-PC

\* \* \* \* \*

DECISION  
AND  
ORDER

NATURE OF THE CASE

This is an appeal pursuant to §230.44(1)(b), stats., of the denial of a request for reclassification.

FINDINGS OF FACT

1. The appellant at all relevant times has been employed by the UW-System in the classified civil service in a position in the System Administration Financial Reporting Department classified as Program Assistant 1 (PA 1).
2. The duties and responsibilities of appellant's position are in summary as follows:

Goals and Worker Activities

Time %

80% A. Fulfillment of Departmental Secretary Function

A.1 Coordinate the flow of all departmental clerical activities, including the production of various reports, including the UW-System annual report, Appellant's Exhibit 7. Although the appellant has some input into the format of the finished product, most of the format considerations are carried over from prior years or are the result of input from the accountants.

<u>Time</u>	<u>Goals and Worker Activities</u> (continued)
80%	<p>A.2 Implement a completely new data storage and retrieval system through the use of a Word Processor OIS 140 (Wang). Includes monitoring the operation of the facility, providing basic training to all staff members in its usage and information on its capabilities, and serve as liaison with word processing technical personnel at Wang and Madison ADP (Administrative Data Processing). This work involves accessing information for reports from ADP. This work is at the Word Processing Operator 2 (WPO 2) (PR2-06) level.</p> <p>A.3 Plan, assign, and oversee the work of a subordinate clerical assistant.</p> <p>A.4 Prepare and mail annual requests for financial and statistical data to business officers of all units of the system.</p> <p>A.5 Order and maintain sufficient supplies inventory; monitor working condition of office machines; keep budgetary control on five blanket orders.</p> <p>A.6 Maintain and monitor progress schedule during Annual Report process.</p> <p>A.7 Maintain, update and review Annual Report mailing list of over 450.</p> <p>A.8 Oversee Annual Report distribution and mailing operation; respond to all inquiries concerning the distribution process.</p> <p>A.9 Maintain staff vacation and sick leave records; submit statements to SA-Personnel for payroll purposes; reconcile periodically to Personnel's records.</p> <p>A.10 Attend ongoing training series in word processing techniques and developments. Train assistant.</p>

Time  
15%

- B. Performance of Miscellaneous Clerical Duties
- B.1 Maintain filing system for correspondence, policy documents, special projects, and other related material.
- B.2. Route incoming and outgoing mail.
- B.3 Arrange staff travel (including preparing travel expense reports), process requisitions for payment; examine monthly phone charges.

15% B. Performance of Miscellaneous Clerical Duties (continued) .

- B.4 Prepare, assemble, and distribute monthly internal financial management documents.
- B.5 Type letters, memos, and other departmental correspondence.
- B.6 Prepare working schedule set-ups.

5% C. Extracting and Compiling Financial Data

- C.1 Post and reconcile transactions of U.W. Plant Ledger; which constitutes the official record of all U.W. buildings, land, and improvements.
- C.2 Assist accountants in preparation of monthly reports and special projects.
- C.3 Proofread and verify accuracy of completed documents.

3. The appellant's position functions under general supervision.

4. The Program Assistant 1, 2, and 3 class descriptions and examples of work performed are set forth in the position standard (Appellant's Exhibit 11) as follows:

II. CLASS DESCRIPTIONS

The following class descriptions for the various class levels within the Program Assistant series are designed to provide basic guidelines for the allocation of both present and future positions, as well as to serve as a basis for comparisons with positions in other class series.

PROGRAM ASSISTANT 1

(PR2-06)

This is work of moderate difficulty providing program support assistance to supervisory, professional or administrative staff. Positions allocated to this level serve as the principal support staff within a specific defined program or a significant segment of a program. Positions at this level are distinguished from the Clerical Assistant 2 level by their identified accountability for the implementation and consequences of program activities over which they have decision-making control. Therefore, although the actual tasks performed at this level may in many respects be similar to those performed at the Clerical Assistant 2 level, the greater variety, scope and complexity of the problem-solving,

PROGRAM ASSISTANT 1 (continued)

the greater independence of action, and the greater degree of personal or procedural control over the program activities differentiates the Program Assistant functions. The degree of programmatic accountability and involvement is measured on the basis of the size and scope of the area impacted by the decision and the consequence of error in making such decisions, which increases with each successive level in the Program Assistant series. Work is performed under general supervision.

PROGRAM ASSISTANT 2

(PR2-07)

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.

PROGRAM ASSISTANT 3

(PR2-08)

This is paraprofessional work of moderate difficulty providing a wide variety of program support assistance to supervisory, professional or administrative staff. Positions are delegated authority to exercise judgment and decision making along program lines that are governed by a variety of complex rules and regulations. Independence of action and impact across program lines is significant at this level. Positions at this level devote more time to administration and coordination of program activities than to the actual performance of clerical tasks. Work is performed under general supervision.

PROGRAM ASSISTANT 4

(PR2-09)

This is paraprofessional staff support work of considerable difficulty as an assistant to the head of a major program function or organization activity. Positions allocated to this class are coordinative and administrative in nature. Positions typically exercise a significant degree of independence and latitude for decision making and may also function as leadworkers. Positions at this level are differentiated from lower-level Program Assistants on the basis of the size and scope of the program involved, the independence of action, degree of involvement and impact of decisions and judgment required by the position. Work is performed under direction.

PROGRAM ASSISTANT 1 - WORK EXAMPLES

Plans assigns and guides the activities of a unit engaged in specialized clerical duties.

Serves as acknowledged expert who resolves the most difficult problems of a complex clerical nature.

Performs most intricate clerical operations, processing documents and performing other clerical operations where comprehensive knowledge of legislation, or organization is required.

Sets-up, maintains detailed budget ledgers posting debits and credits, issuing credits and refunds, and generally insures all records are accurate and up-to-date.

Purchases and requisitions supplies, including capital purchases and services, and follows up to insure merchandise or services are received and priced accurately.

Gathers and organizes information into summary reports, as assigned.

Maintains department or program schedule.

Develops and revises operating procedures affecting the immediate work unit.

Composes and types correspondence, requiring knowledge of departmental operations and regulations, which may not be reviewed by a superior.

Counsels and assists the public when applying for services provided by the program assigned, and may interview applicants to determine eligibility for program benefits and/or services.

PROGRAM ASSISTANT 2 - WORK EXAMPLES

Provides administrative assistance to supervisory, professional and administrative staff, head of a department or program.

Schedules department facilities usage.

Maintains inventory and related records and/or reports and orders supplies.

Conducts special projects: analyzes, assembles, or obtains information.

Maintains liaison between various groups, both public and private.

Directs public information activities and coordinates public or community relations activities.

Prepares budget estimates, plans office operations, controls bookkeeping functions and handles personnel transactions.

Plans, assigns and guides the activities of subordinate employees engaged in clerical program support work.

Corresponds with various outside vendors or agencies to procure goods or information for program operation.

Develops and recommends policies, procedures, guidelines and institutions to improve administrative or operating effectiveness.

PROGRAM ASSISTANT 2 - WORK EXAMPLES (continued)

Screens and/or reviews publications; drafts or rewrites communications; makes arrangements for meetings and maintains agendas and reports; arranges schedules to meet deadlines.

Maintains extensive contact with other operating units within the department, between departments or with the general public in a coordinative or informative capacity on a variety of matters.

Prepares informational materials and publications for unit involved, and arranges for distribution of completed items.

Attends meetings, work shops, seminars.

PROGRAM ASSISTANT 3 - WORK EXAMPLES

Prepares reports, research project data, budget information, mailing lists, record keeping systems policies and procedures, training program, schedules and generally oversees operations.

Plans, assigns and guides the activities of a unit engaged in the clerical support of the program assigned.

Develops and/or revises selected policies and procedures affecting the administration of the program.

Answers questions regarding the program or division via telephone, correspondence or face-to-face contact.

May serve as an Assistant in charge of secretarial and administrative tasks in an operation handling cash procedures, equipment orders, inventory, program preparation, pricing, etc.

Composes correspondence, maintains files of program related data, sets up schedules and performs any related administrative support function necessary to the operation of the program.

May be in charge of public relations, preparing and sending out pamphlets, brochures, letters and various program publications.

5. The appellant's position is comparable, with respect to classification level, to the positions described by Respondent's Exhibits 5 - 11.

6. In a letter dated October 26, 1981, the UW System Office of Personnel, Employee Relations, Staff Development and Payroll Services denied a request for the reclassification of appellant's position. This decision was made on a delegated basis from the administrator pursuant to §230.05(a), stats.

7. The appellant's position is best described by the position standard for Program Assistant 1 and most appropriately classified in that classification.

CONCLUSIONS OF LAW

1. This appeal is properly before the Commission pursuant to §230.44(1)(b), stats.

2. The appellant has the burden of proving that the respondents erred in denying the request for reclassification of her position, and that it is more properly classified as a Program Assistant 2 or 3 rather than a Program Assistant 1.

3. The appellant has not sustained her burden.

4. The respondents did not err in denying the request for reclassification of appellant's position and it is more properly classified as Program Assistant 1 rather than Program Assistant 2 or 3.

OPINION

The Program Assistant series position description uses general language in the class descriptions. As was brought out in the testimony, many of the functions of the appellant's position, viewed in the abstract, could be found within any of the four levels of the series. In order to properly classify such a position, it is important to draw comparisons with other positions.

The most significant recent change in the appellant's position and the major argument in favor of reclassification was the addition of automated word processing equipment, including the capability to access accounting data from central ADP for such purposes as preparing the annual report. While there is no question that this addition enhanced the position to some extent, the question is whether it, and other relevant factors, are sufficient to put the position at a higher level.

In this context, it is significant that on this record there are no PA 2 or 3 positions described with which comparisons can be drawn. On the other hand, the respondent presented uncontradicted testimony that the word and data processing aspects of this job were of the nature performed at the WPO 2 level, which is at the same pay range (2-06) as is PA 1.

Another significant feature of this record is that although the appellant placed great emphasis on her role in producing the annual report, it was clear that her input into format considerations was limited. For example, although the appellant must be able to access data for the report from ADP, Mr. Conklin, the assistant director, testified that the layout for the final report is mostly carried over from prior years. Her basic role of producing the final copy certainly was enhanced by the addition of the Wang word processor capability, including the ADP linkage, but the importance, from a classification standpoint, of this aspect of the job is limited by the respondents' uncontradicted evidence that such use of such equipment is associated with WPO 2 positions, which are in the PA 1 pay range.

There was testimony that some of the appellant's work in extracting and compiling financial data, listed under item "C" on her position description, could be considered at the PA 2 level, but this accounts for less than 5% of the total duties and responsibilities.



ORDER

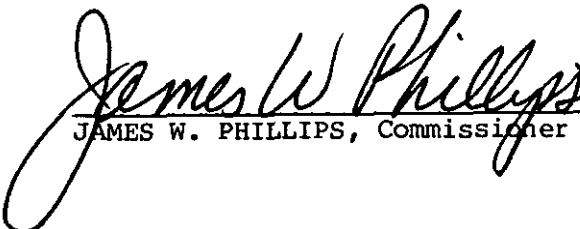
The respondent's action denying the request for reclassification of appellant's position is affirmed, and this appeal is dismissed.

Dated: August 5, 1982 STATE PERSONNEL COMMISSION

Commissioner Murphy abstained from voting in this decision.

  
LAURIE R. McCALLUM, Commissioner

AJT:jmf

  
JAMES W. PHILLIPS, Commissioner

Parties:

Ann McIntosh  
407 A.W. Peterson Bldg.  
750 University Avenue  
Madison, WI 53706

Charles Grapentine, Administrator  
DP  
P. O. Box 7855  
Madison, WI 53707

Robert O'Neil, President  
1700 Van Hise Hall  
1220 Linden Drive  
Madison, WI 53706