

STATE OF WISCONSIN

PERSONNEL COMMISSION

* * * * *

JAN HOPWOOD,

Appellant,

v.

President, UNIVERSITY OF
WISCONSIN and Acting Admin-
istrator, DIVISION OF PERSONNEL,

Respondents.

Case No. 83-0013-PC

* * * * *

DECISION
AND
ORDER

NATURE OF THE CASE

This is an appeal, pursuant to §230.44(1)(a), Wis. Stats., of the denial by respondent University of Wisconsin of appellant's request for reclassification of her position from Program Assistant 1 (PR 2-06) to Secretary 1 (PR 2-07) or to Program Assistant 2 (PR 2-07).

FINDINGS OF FACT

1. At all times relevant to this matter, appellant has been employed in the classified civil service with the Office of Information Systems of the University of Wisconsin Systems Administration.

2. Appellant was originally hired by the UW Systems Administration to fill a position classified as a Typist 3; appellant's position was subsequently reclassified to Administrative Secretary 1 and was then reallocated, prior to 1980, to Program Assistant 1, as a result of a survey of state clerical positions.

3. On June 2, 1980, a request was made for the reclassification of appellant's position. An audit of appellant's position was conducted on November 5, 1980, by Vicki Durtschi, a personnel specialist with the UW, and, on January 5, 1981, this request for reclassification was denied by the UW. Appellant did not file an appeal of such denial.

4. On December 23, 1981, a request was made for the reclassification of appellant's position from Program Assistant 1 (PA 1) to Secretary 1 or Program Assistant 2 (PA 2). On September 29, 1982, an audit of appellant's position was conducted by Susan Dunn, a personnel specialist with the UW. On January 7, 1983, this request for reclassification was denied by the UW. On January 25, 1983, appellant filed a timely appeal of such denial with the Personnel Commission.

5. The duties and responsibilities of appellant's position are as set forth in the attached position description signed by the appellant on June 25, 1980, a copy of which is attached hereto and incorporated by reference as if fully set forth as a part of this finding.

6. The Inclusion section of the Secretary position standard states as follows:

This series encompasses positions that function as personal secretaries to supervisors, managers, administrators, professionals or other officials. Position's primary functions are to represent the office and its principle officers with respect to administrative matters surrounding office business. Positions may function to a lesser extent as a resource or technical authority concerning the organization's programs in addition to secretarial duties.

The class description for the Secretary 1 classification states as follows:

This is office assistance work of moderate difficulty in providing personal secretarial services to a professional, educator, or administrator. Positions allocated to this class perform a variety of secretarial duties, including: taking, transcribing and typing dictation; making arrangements for meetings or travel; screening and distributing mail; drafting general correspondence; filing and developing filing systems; operating a variety of office equipment; taking minutes at meetings; maintaining simple financial records; ordering supplies and equipment; composing correspondence; and keeping time reports a majority of the time. Work is performed under general supervision.

7. The class description for the PA 1 classification states as follows:

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, 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.

8. The class description for the PA 2 classification states as follows:

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.

9. The primary distinction between the Secretary and Program Assistant series is that positions classified as secretaries primarily provide personal clerical support services for one individual while positions classified as program assistants primarily provide support services for a particular program or programs and the individuals involved in such programs.

10. The primary responsibility of appellant's position is to provide clerical support services for a program, i.e., the Office of Information Systems, and the Office's 27 staff members.

11. Appellant's position is more appropriately classified in the Program Assistant series than the Secretary series.

12. The primary distinction between the PA 1 classification and the PA 2 classification, for purposes of the analysis required by the facts of this appeal, is that a PA 2 position performs duties that are greater in scope and impact, involve a greater degree of programmatic involvement, and require the exercise of a greater degree of independent judgment and discretion than the duties of a PA 1 position. The majority of the duties of a PA 2 position would not consist of typing, receptionist, mail distribution, scheduling, filing, and document duplication duties.

13. Appellant, in performing the duties of her position, devotes approximately 50% of her time to typing and an additional amount of time to performing receptionist, mail distribution, scheduling, filing, and document distribution duties. Although appellant does perform certain duties of greater scope and impact on a relatively independent basis, e.g., purchasing, inventory, leave and time accounting, document production, and librarian duties, these duties constitute only a small percentage of the total duties of appellant's position.

14. Appellant's position is more appropriately classified at the PA 1 level than the PA 2 level.

CONCLUSIONS OF LAW

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

2. The appellant has the burden of proving that respondent's decision denying the reclassification of appellant's position from Program Assistant 1 to Secretary 1 or Program Assistant 2 was incorrect.

3. The appellant has failed to sustain her burden of proof.

4. Respondent's decision denying appellant's reclassification was correct.

OPINION

The proper classification of a position involves a weighing of the class specifications and the actual work performed to determine which classification best fits the position. In appeals of reclassification denials, it is frequently the case that the duties and responsibilities of the subject position overlap in some respects both of the class specifications in question. The position is not entitled to reclassification because some aspects of the work involved fall within the higher class, Kailin v. Weaver and Wettengel, 73-124-PC(11/28/75), particularly if those

aspects constitute less than a majority of the total duties and responsibilities of the position.

It is clear from the language of the Secretary position standard, from the testimony of a classification expert from the University of Wisconsin and a classification expert from the Division of Personnel, from the UW's allocation pattern for the Secretary series, and from a review of Secretary positions in state service in general and in the UW system in particular, that the Secretary series is intended to include and does include those positions which primarily provide clerical support services for one individual. A review of appellant's position description and the testimony of appellant and her supervisor clearly indicates that appellant's position primarily provides clerical support services for a program, i.e., the Office of Information Systems, and for the Office's entire 27-member staff, and not for one individual. Appellant's position is not, therefore, appropriately classified within the Secretary series.

The question then becomes one of ascertaining whether appellant's position is more appropriately classified within the Program Assistant series and, if so, at the PA 1 or PA 2 level. The primary criterion for classification of a position within the Program Assistant series is that the position primarily provide support services for a particular program or programs. It has already been established that this is the primary function of appellant's position. A comparison of the duties of appellant's position with the class description and work examples sections of the position standards for a PA 1 and PA 2 indicates that the fact that the majority of the duties of appellant's position involve typing, receptionist, mail distribution, scheduling, filing, and document duplication duties,

supports the classification of appellant's position at the PA 1 level as opposed to the PA 2 level. Although appellant does perform certain duties of greater scope and impact and in a relatively independent manner, these duties constitute only a small percentage of the total duties of appellant's position.

Because the language of the PA 1 and PA 2 position standards is phrased in general terms, a review of positions classified at these two levels was also conducted. In particular, it should be noted that positions which provide clerical support services equivalent to those provided by appellant's position and for computer centers equivalent to the Office of Information Systems are classified at the PA 1 level.

ORDER

Respondent's denial of appellant's request for reclassification is affirmed and this appeal is dismissed.

Dated: May 25, 1983 STATE PERSONNEL COMMISSION

LRM:lmr

Parties:

Jan Hopwood
Analysis Services & Info Systems
Room 607, WARF Bldg.
P.O. Box 8010
Madison, WI 53708

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

Glen Blahnik, Acting Administrator
DP
P.O. Box 7855
Madison, WI 53707


DONALD R. MURPHY, Chairperson


LAURIE R. McCALLUM, Commissioner


JAMES W. PHILLIPS, Commissioner