

STATE OF WISCONSIN

PERSONNEL COMMISSION

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BARBARA PEDRETTI,

Appellant,

v.

President, UNIVERSITY OF  
WISCONSIN SYSTEM (La Crosse)  
and Secretary, DEPARTMENT OF  
EMPLOYMENT RELATIONS,

Respondents.

Case No. 88-0070-PC

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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 from Program Assistant 2 (PA 2) to Program Assistant 3 (PA 3).

FINDINGS OF FACT

1. At all relevant times appellant has been employed in the classified civil service at University of Wisconsin - La Crosse (UW-LC) in the Department of Student Activities and Centers.

2. Appellant reports to Dr. Robert R. Mullally, Director of Student Activities and Staff, and operates under general supervision.

3. The duties and responsibilities of appellant's position are, in summary, as follows:

A. Office administration (44%), including office supervision, (25%). Office supervision includes acting as a lead worker for 3 clerical employes and supervising 14-16 student employes, establishing

director and assistant director changes in staffing and assignments, acting as liaison with vendors for all office equipment repairs and maintenance contracts, and, in the absence of the director, associate director and assistant director, acting as department representative in interpreting department and university policies regarding daily operations. Office administration also involves processing purchase orders (10%). This includes assisting staff in departmental and UW-LC expenditure policy interpretation, administration and enforcement, checking purchase requisitions for completeness and accuracy and forwarding them to the director for approval, reviewing requests for confirming order numbers to determine program compliance while referring questions or problems regarding the authorization or appropriateness of expenditures to the director, and supervising and overseeing various related recordkeeping and bookkeeping activities. This position also functions as the director's secretary (8%) and is responsible for ordering and maintaining an inventory of office supplies and equipment (1%) much of the actual clerical activities in these areas are actually performed by student employes under delegation by appellant.

B. Staff orientation and training (33%). This includes professional staff orientation and training (10%) which includes providing advice regarding policies and procedures for purchasing, vehicle usage, travel regulations, etc., assisting members in locating university services and community vendors and services necessary for program implementation, participating in formal orientation sessions to train new staff in office procedures and administration, and preparing instructional materials including a procedures manual to

assist staff in learning departmental procedures and operation. This heading also includes student help supervision (20%), which involves the hiring, training, discipline and work supervision of 14-16 clerical student employees. Publicity policy administration (1%) includes such things as reviewing publicity items for compliance with the campus publicity policy. Supervision of the mail and file room (2%) involves such things as the supervision of student employees in mail sorting, routing, etc.

C. Program services coordination (23%). This includes supervision of the photo copy service (10%), which involves supervision of the financial recordkeeping and daily maintenance of 3 copy machines comprising about \$12,000 in annual revenue (\$8000 in cash sales & \$4000 in departmental chargebacks), recordkeeping and reporting, etc. The Associate Director of the Department (Larry Ringgenberg) has responsibility for the copy center (see Appellant's Exhibit 4). Supervision of the typewriter rental service (5%) involves functions which are similar to those found in the photo copy service area, with a gross annual revenue of in excess of \$2,000. However, the Ringgenberg position is not responsible for this activity, and appellant's duties and responsibilities include establishing and administering operating policies and procedures for the use of the typewriter service, key records and checkout (3%). Includes supervision of key use and replacement, maintenance of records, issuance of keys to building personnel (with director's approval), and the preparation of orders for new or replacement keys for the director's approval. Supervision of petty cash account \$50 (1%). Includes the maintenance of records and review of expenses for program

compliance. Building use invoicing (1%). Includes the preparation of invoices for building use and equipment rentals for campus and community organizations as determined by the assistant director, recordkeeping, and depositing funds. Supervision of Racquet (student publication) ad procedures (2%). Includes the development of working relationships and appropriate procedures for department advertising with Racquet staff, establishment and coordination of procedures for departmental accounting for organizations advertising in the Racquet, and invoicing activity. Serving as Notary Public (1%). Additional programmatic support (1%). This includes mail handling, filling in in the absence of other clerical employes, sharing supervision of the staff, and assisting with the editing and preparation of departmental publications.

4. Appellant's position has undergone changes since the 1983 position description (Respondent's Exhibit 4) was prepared. In summary, the position has become less involved with clerical and receptionist-type activities and more involved in office management and program-oriented activities. During this period, a new position, associate director, was added to the department.

5. The UW-LC student center operation is unique compared to other campuses, primarily in that the department is responsible for student organizations, while at other campuses this typically is the responsibility of the dean of students or the vice-president for student affairs, and is also responsible for handling other activities such as managing the lecture and concert series and scheduling university facilities for all non-class purposes.

6. The position standards for PA 2 and PA 3 (Respondent's Exhibit 12) contain the following definitions and work examples:

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 precedent 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.

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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.

Screens and/or review 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 programs, 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.

7. The classification factors set forth in the PA position standard are as follows:

#### D. Classification Factors

Individual position allocations in this series will be based on the four following classification factors:

1. Accountability;
2. Know-How;
3. Problem-Solving; and

#### 4. Working Conditions

which include:

- a. The diversity, complexity, and scope of the assigned program, project, staff responsibilities, or activities;
- b. The level of responsibility as it relates to: type and level of supervision received, status within the organization, and degree to which program responsibility and accountability are delegated and/or assigned;
- c. The degree to which program guidelines, procedures, regulations, precedents, and legal interpretations exist and the degree to which they must be applied and/or incorporated into the program and/or activities being carried out by the position;
- d. The potential impact of policy and/or program decisions on state and non-state agencies, organizations, and individuals;
- e. The nature and level of internal and external coordination and communication required to accomplish objectives;
- f. The difficulty, frequency, and sensitivity of decisions which are required to accomplish objectives and the level of independence for making such decisions.

8. Other positions which constitute a basis of comparison to appellant's position include the following:

- a) PA 4 which oversees activities of Copy Center at Waisman Center on Mental Retardation and Human Development at UW-Madison (Appellant's Exhibit 51). This position manages the copy center and acts as lead office worker in the Waisman Center business office. It also is responsible for managing all data input and manipulation for computer processing functions required by Waisman Center administration, compiling and diagnosing data and resolving problems identified with the assistant to the Director/Finance and individual faculty members and other investigators. This includes maintaining individual expenditure records for the Waisman Centers' 82 grants

totalling over \$8,000,000 annually, and requires a paraprofessional level accounting knowledge. This position is also involved in Management Information System Program maintenance and functions, which includes items such as identifying program malfunctions and bringing major errors to the attention of the computer programmer.

This position is involved in accounting that goes beyond the comparatively limited bookkeeping and recordkeeping associated with appellant's position, and in relatively significant computer activities. It cannot be concluded on this record that appellant's position compares favorably from a classification standpoint to this position.

b) PA 3 which manages the Memorial Library copy center and maintains photocopier services in other locations, UW-Madison (Appellant's 52 and 53) (shared position). This position is responsible for 11 copiers and about \$200,000 in annual revenue, and develops and/or revises policies and procedures as necessary.

While it is difficult to compare a position that functions 100% in an area which only constitutes 10% of appellant's position description, there does not appear on this record to be an adequate basis for a favorable classification comparison between this position and appellant's position based, on the greater extent of the copier operation supervised and the greater independence of responsibility, when compared to the associate director's responsibility for the copying operation at UW-LC.

c) PA 3 at UW-M library (Appellant's Exhibit 54) which manages Business Office affairs relating to supplies and expense budget operation and the coin-operated photocopy center, and which serves as

the primary liaison with UW-M accounts Payable and Purchasing Offices. This position maintains 300 blanket and running order accounts, as compared to 10-12 for appellant's position. The copy center operation includes 14 copy machines, 1 vending machine, and 9 change machines. From a classification standpoint, it cannot be said on this record that appellant's position compares favorably to this position, because of the larger size of the purchasing and copy center operations associated with this position.

d) PA 3 which functions as manager of the University Copy Corner at UW-Eau Claire (Appellant's Exhibit 55). The copy corner is involved in wordprocessing, typing, printing and copying of material, and button-making, manuscript binding, laminating, and making overhead projector transparencies, and generates about \$85,000 annual revenues. This position is responsible for the supervision of 25 students and 4 LTE positions. From a classification standpoint, this position presents some difficulties in comparison, because it is concentrated in one area (copy center) that represents only 10% of appellant's position. However, on this record, it cannot be concluded that appellant's position compares favorably to this position, due to the substantially larger operation for which this position is responsible, and the fact that there is no indication that there is another position like the Ringgenberg associate director position that has management responsibilities for the copy center.

e) PA 3 serving as the administrative assistant for the counseling and testing center at UW-LC (Appellant's Exhibit 56). This position's responsibilities include coordinating all testing program operations during the summer session, coordination of the Miller's

Analogies testing program, the organization and preparation of all national test materials for the administration of 12 national tests given on an annual basis, and the selection, training and supervision of all national testing personnel. In addition, this position is responsible for various office supervisory and other administrative tasks. Based on Mr. Quick's uncontradicted testimony, it can be concluded that this position is paraprofessional in nature with direct program involvement in the testing program, so that while the office administration-type duties are similar to appellant's position, this more advanced, programmatic type aspect prevents a favorable comparison to appellant's position.

f) PA 3 which serves as the assistant to the purchasing agent at UW-LC (Appellant's Exhibit 57), and which is responsible for interpreting and implementing UW System purchasing policies and procedures, coordination and preparation of state and UW system purchasing documents and reports, resolution of purchasing issues and/or difficulties, coordination of purchasing procedures and policies with accounts payable and accounting departments, and the direction of one typist and a number of student employes. While appellant's position has some responsibility for purchasing at the departmental level, Appellant's Exhibit 4 reflects that Dr. Ringgenberg also has responsibility for purchasing. The same document characterizes appellant's assignment as "purchase order processing." Furthermore, appellant's position description (Respondent's Exhibit 3) states "...refer questions or problems regarding authorization or appropriateness of expenditure to director." The position in question operates under the direction of the purchasing agent, but it has

campus-wide scope and is more deeply involved in the purchasing program than appellant. From a classification standpoint, there is an insufficient basis on this record for a conclusion that appellant's position is comparable to this position.

g) PA 3 in Dean of Student Affairs Office at UW-LC (Appellant's Exhibit 58). The duties and responsibilities of this position include serving as liaison between officers of student government and the Dean of Student Affairs, the associate Dean of Student Affairs, unit directors of the Student Affairs Division, faculty, students of the College Student Personnel Program, and students in general; preparing reports for the deans, including financial aid and food service reports; assisting in research and in preparing statistics for reports, projects, surveys, etc.; coordinating college student personnel graduate program procedures; and various office, budget, and records management functions. Mr. Quick's uncontradicted testimony supports conclusions that this position has significant programmatic involvement in the coordination of program information between the dean's office and other departments where the dean's office has line authority, and coordinating paraprofessional functions in connection with the student personnel graduate program, and that at the dean level there is less involvement by the dean with the paraprofessional activities such as performed by the position in question than would be the case at other levels in the academic departments. These factors prevent a conclusion that appellant's position compares favorably with this position.

h) PA 3 functioning as Inhouse Printing and Duplicating Manager, Duplicating and Printing Office, UW-LC (Appellant's Exhibit 59).

In summary, this position supervises and coordinates the work flow of the campus print shop and the reprographics account. It includes an offset press operation and more than 20 copy machines. This position is much more technically-oriented and program-oriented compared to appellant's position. It cannot be concluded on this record that appellant's position is comparable from a classification standpoint.

i) PA 2 in Physical Education Department, UW-LC (Respondent's Exhibit 5). This position provides information to the public and other elements on campus about department policies, schedules, facilities, etc., acts in a coordinative fashion among the department's units, administers the operation of the department's clerical staff, is involved in recordkeeping, scheduling, report preparation, bookkeeping, clerical (20%) and miscellaneous. While appellant's position has a wider variety of identifiable functions, it cannot be concluded on this record that those functions are being conducted at a significantly higher level of programmatic involvement, complexity or responsibility or other factors that would justify a higher level for appellant's position than for this position.

j) PA 2 in the Career Services Office, UW-LC (Respondent's Exhibit 6). This position is responsible for managing the department's clerical support staff, coordinating and monitoring data, schedules, and other information necessary for the functioning of the Career Services Office, especially the Cooperative Education and Internship Program, and recordkeeping (20%) and clerical (5%). This position's orientation is office management with some programmatic involvement, and with a narrower range of activities than appellant's job. On this record, it cannot be said that the level of the

activities performed by appellant's position would justify a higher level than this position.

k) PA 2 at UW-Stout Student Center (Respondent's Exhibit 7). This position is responsible for scheduling facilities, the operation of the information desk, performing the secretarial functions of the student center director (5%), and supervising clerical staff and student employes including clerical and information desk attendants. Again, while this position's functions are more limited in terms of the variety of its activities, it falls within the same kind of administrative, office management type job as appellant's position, and it cannot be concluded that appellant's position is at a higher level.

l) PA 2 serving as secretary to the Director, Parkside Union, and as campus reservations coordinator (Respondent's Exhibit 8). This position is responsible for the coordination and supervision of the Parkside Union office operations and for campus facilities reservations. This involves the direction/supervision of a fiscal clerk, program assistant, and student workers. This position also provides secretarial services (25%) and performs other activities. From a classification standpoint, this position fits in the category of an administrative and coordinative-type support position without a great deal of programmatic involvement. It cannot be concluded on this record that appellant's position is at a higher level.

9. On May 20, 1987, James Quick, UW-LC Personnel Manager, informed appellant that after reviewing the classification of her position, it would be maintained at the PA 2 level rather than PA 3 (Respondent's Exhibit 1).

10. On May 23, 1988, James Cimino, Personnel Specialist for the UW System Office of Personnel Services/Employe Relations also denied her request for reclassification from PA 2 to PA 3 (Respondent's Exhibit 2).

11. Appellant's position is more appropriately classified at PA 2 rather than PA 3.

CONCLUSIONS OF LAW

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

2. Appellant has the burden of proving that respondents erred in denying her request for reclassification from PA 2 to PA 3.

3. Appellant having failed to sustain her burden, it must be concluded that the decision to deny reclassification of her position from PA 2 to PA 3 was not incorrect.

DISCUSSION

Appellant's position, as summarized in its position description (Respondent's Exhibit 3) reflects that the great majority of its functions involve office administration and the direction of clerical-type activities. At a minimum, the following activities fit into this category:

A.1. OFFICE SUPERVISION:	25%
A.2. PURCHASE REQUISITIONS:	10%
A.3. DIRECTOR'S SECRETARY	8%
A.4. OFFICE SUPPLIES AND EQUIPMENT	1%
B.1. PROFESSIONAL STAFF ORIENTATION AND TRAINING	10%
B.2. STUDENT HELP SUPERVISOR	20%
B.4. SUPERVISE CARTWRIGHT CENTER MAIL AND FILE ROOM	2%
	<u>76%</u>

The only one of the above activities which even arguably is other than office administration or the direction of clerical-type activities is B.1., "PROFESSIONAL STAFF ORIENTATION AND TRAINING." However, the more specific activities indicate that most if not all of this involves orientation as to activities of this nature:

- B.1. PROFESSIONAL STAFF ORIENTATION AND TRAINING 10%
- B.1.a. Advise administrative and clerical staff regarding policies and procedures for purchasing, vehicle usage, travel regulations, use of state equipment and staff, departmental operating procedures, confirming orders, requisitions, check requests, supplies orders, food service request forms, blanket orders, invoices, keys, etc.
- B.1.b. Assist staff members in locating university services and community vendors and services necessary for program implementation.
- B.1.c. Participate in formal orientation sessions to train new staff relative to office procedures and administration.
- B.1.d. Prepare instructional materials and procedures manual to assist staff in learning departmental procedures and operations.

The kind of office administration and clerical management encompassed by at least 76% of appellant's duties and responsibilities is identified by the PA position standard (Respondent's Exhibit 12) in the examples of work performed at both the PA 2 and PA 3 levels, e.g.:

PA 2: ...Prepares budget estimates, plans office operations, control bookkeeping functions and handles personnel transactions.  
Plans, assigns and guides the activities of subordinate employes 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 [sic?] to improve administrative or operating effectiveness....

PA 3: Plans, assigns and guides the activities of a unit engaged in the clerical support of the program assigned.

However, in order for a position to be a Program Assistant 3, the PA 3 definition requires that the work be "para-professional" in nature and that the position have been "delegated authority to exercise judgment and

decision-making along program lines that are governed by a variety of complex rules and regulations." Appellant's work has not been shown to fit within this definition. The kinds of policies and regulations with which she deals tends to be the kind one would associate with office management rather than more advanced, complex rules and regulations. For example, appellant's position description (Respondent's Exhibit 3) includes "Assist activities and center staff in departmental and UWL expenditure policy interpretation, administration and enforcement." The PA 3 identified in Appellant's Exhibit 57 has campus wide responsibility to educate departments with respect to state and UW-System procurement policies.

Therefore, while office administration/clerical management is a work example at both the PA 2 and PA 3 levels, the 76% of appellant's job that fits within this category is insufficient to put her job at the PA 3 level on the basis of the position standard per se.

Appellant also attempted to compare her position to a number of PA 3's. One of the problems with this effort is that frequently positions have superficially similar functions that are performed in different contexts that substantially affect the scope and level of responsibility of the two positions. A good example of this was found in Dworak v. DP, Wis Pers. Commn. 79-PC-CS-198 (2/9/82), where the Commission rejected an attempt to compare the fleet management responsibilities of a Clerical Supervisor 1 position which managed a fleet of 2 vehicles, with the fleet management responsibilities of an Administrative Assistant 3 position which managed a fleet of 45 vehicles. While superficially the fleet management functions of the two jobs sounded the same (make reports regarding vehicle usage, arrange for vehicle maintenance, etc.), managing the larger fleet had much greater scope of responsibility and impact.

In this case, appellant tried to compare, for example, the copy center functions of her positions with other positions whose copy center operations were much larger and consumed a much greater percentage of the position's time. An example of the difficulties with this approach involved the PA 3 which functions as the In-house Printing and Duplicating Manager at UW-LC (Appellant's Exhibit 59). This position manages an offset press operation and over 20 copy machines, as compared to appellant's operation which involves 3 copy machines and falls within the program responsibilities of the associate director, who is not within the chain of supervision over appellant.

Appellant's purchasing activities are another example of this. Appellant's position description includes 10% for purchase requisitions (this was described in Appellant's Exhibit 4, a compilation of department staff assignments, as "purchase order processing"). She tried to compare her job to a PA 3 which serves as the purchasing assistant at UW-LC (Appellant's Exhibit 57) and which has far more extensive involvement in interpreting policy and in the purchasing program than appellant's position. The conclusion that these functions are not comparable is also reinforced by the fact that the associate director is also responsible for purchasing.

At least in part because of the variety of functions performed by appellant's position and the relatively unique nature of the student center at UW-LC, it is relatively difficult to find positions to use as a basis for comparison. However, overall the Commission was more comfortable with the PA 2 than the PA 3 comparisons. For example, the PA 2 in the UW-LC Career Services Office (Respondent's Exhibit 6) has 45% for office management per se and another 30% defined as "coordinate and monitor data,

schedules and other information necessary for functioning of the Career Services Office, especially the Cooperative Education and Internship Program." This additional function appears to be office management-oriented. Even though appellant's position has a wider variety of functions, this is not enough to justify a conclusion it should be at a higher level in the series.

Appellant contends that she is a leadworker for another PA 2 (Beverly Kratt). However, this is not supported by the record although appellant's coordinative role may be said to encompass this position.

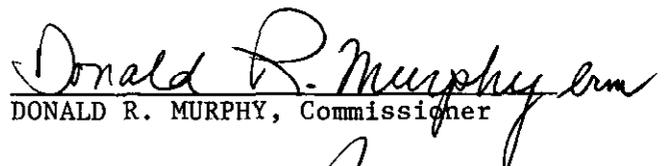
Finally, while appellant's position has changed, as set forth in finding #4, these changes have not moved appellant's position to the PA 3 level. Some of the change has had a negative impact, inasmuch as a new position (associate director) has been created which has responsibility for certain areas (copy center and purchasing) which appellant is trying to use to enhance the level of her position.

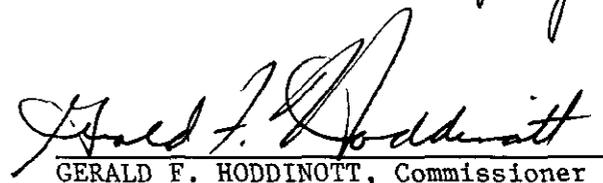
ORDER

Respondents' action denying reclassification of appellant's position from PA 2 to PA 3 is affirmed and this appeal is dismissed.

Dated: May 3, 1989 STATE PERSONNEL COMMISSION

  
LAURIE R. McCALLUM, Chairperson

  
DONALD R. MURPHY, Commissioner

  
GERALD F. HODDINOTT, Commissioner

AJT:jmf  
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