



STATE OF WISCONSIN

PERSONNEL COMMISSION

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MARY BALDWIN,  
                     Appellant,

v.

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

Case No. 82-87-PC

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DECISION  
 AND  
 ORDER

This matter is before the Commission as an appeal from respondent's decision to deny appellant's reclassification request. The parties have agreed to the following issue in this case:

Whether respondents erred in denying appellant's request for reclassification from Program Assistant 2 (PR2-07) to Program Assistant 3 (PR2-08).

Sub-issue: Whether appellant's position is more properly classified as Program Assistant 2 or Program Assistant 3.

FINDINGS OF FACT

1. Since 1978, the appellant has been employed by respondent University's Madison Academic Computer Center (hereafter referred to as MACC). MACC is a large provider of computer services to a variety of users, including various academic departments on the Madison campus, as well as to state agencies, private corporations and individuals.

2. MACC is divided into four major operational units: Fiscal and Staff Services; Operations and Systems; Technical Services; and Network and Software Services.

3. The working title of the appellant's position is Operations Auxiliary Services Lead Clerk. Her position is assigned to the Operations and Systems unit. The appellant's first line supervisor is James Hallen, Operations Coordinator in the Operations and System unit.

4. In February, 1981, the appellant requested an updated position description which was subsequently agreed upon and signed on May 22, 1982, by the appellant, her first line supervisor, Mr. Hallen, and by Mr. Musolf who serves as Personnel Manager for MACC. This PD was then submitted to the UW-Madison Classified Personnel Office as an updated PD. The appellant had mistakenly understood that a request for an updated position description would automatically result in a reclassification review. In July, 1981, by letter to Mr. Musolf, the appellant formally requested a reclassification of her position. The appellant submitted a draft of a more recently revised PD to Mr. Hallen on November 29, 1981. The revisions were based, at least in part, on daily notes kept by the appellant which allowed her to assign percentages of time spent to individual job responsibilities. The appellant's draft was used by Mr. Hallen and Mr. Musolf in the development of a new PD which they signed on December 22, 1981. However, the appellant did not find this most recent version to be satisfactory and she did not sign it.

5. On March 5, 1982, University of Wisconsin-Madison Personnel received the necessary documents to proceed with the appellant's reclassification request. The appellant's position was reviewed and the reclassification was denied by the respondent UW pursuant to its delegated authority. The appellant filed a timely appeal with the Commission.

6. During a period of at least six months prior to March, 1982, the appellant's position could accurately be summarized as follows:

Perform program support activities for MACC Auxiliary Services including consumables inventory/ordering/sales, documentation sales, tape library/catalog file service transactions, contract operator/processing services, and lead worker activities.

7. The appellant spends approximately 35% of her time fulfilling her inventory control function. The inventory involved includes both consumables (office supplies, continuous forms, cards, tapes, ribbons and other computer related supplies) and documentation (approximately 200 documents that are for the most part MACC generated which list and/or explain the available software packages). Appellant's duties in this area include:

- A1. Update manual inventory for consumables.
- A2. Update computerized inventory system for MACC documentation sales. Generate periodic reports.
- A3. Based on inventory reports and special requests, place orders, receive and reconcile same, for consumables and MACC documentation.
- A4. Make recommendations to Operations Coordinator as to selection of vendors when option exists and as to the establishment of blanket orders based on product availability and price.
- A5. Maintain file of originals for MACC documents.
- A6. Ensure that consumables pricing reflects costs.
- A7. Provide various MACC supported sites with consumables inventory requirements. Initiate charge slips for billing.
- A8. Answer user inquiries concerning acquisition source of computer-related consumables.

8. Approximately 30% of the appellant's time is spent as the leadworker in Operations Auxiliary Services. Appellant oversees the work of one classified position (the tape librarian classified at the MIT-1 level) and two student positions. Appellant's specific duties in this area are to:

- B1. Provide assistance/direction for other employes in the Auxiliary Services area.
- B2. Train new employes as required.

- B3. Meet with Supervisor for area planning, policy determination, area activities, problem solving, and specific job assignments.
- B4. Address problems as required.
- B5. Perform special activities/projects as required.
- B6. Provide backup support for Tape Librarian.
- B7. Provide monthly report for general information of MACC staff regarding inventory, tape library, documentation, and contract operator functions activities.

9. Approximately 25% of appellant's time involves counter sales/services. Specific duties in this area are to:

- C1. Provide users with information concerning availability of MACC services and charges, documentation, and Tape Library services.
- C2. Sell consumables to users and record sales.
- C3. Process tapes in and out of library.
- C4. Process user microfiche requests.
- C5. Load, delete, activate, terminate files on user request.
- C6. Distribute MACC documentation to users and staff.
- C7. Use Transaction Handler to check valid project/ID and enter charges.
- C8. Register short course participants.
- C9. Process locker rentals and renewals.
- C10. Send out, receive, and distribute to users and staff, film, slides and photographs generated by the Computer system.
- C11. Generate cash register balance at end of each day.
- C12. Count token and card receipts and record.

10. The appellant's final area of responsibility is contract operator/processing services, which represents approximately 10% of her time. The appellant responds to user requests to run jobs that they wish to have

done for them rather than coming into MACC and running it themselves. The contract operator function is limited to canned or standardized programs and usually instructions are sent along with the request to explain exactly how to go about obtaining the desired output. The appellant averages only 2-3 runs per week. Specific duties in this area include:

- D1. Initiate user supplied computer runs upon request. These runs generate output in the form of labels, continuous forms, tapes, plots and special forms.
- D2. Provide MACC Billing Office with charges associated with this service.
- D3. Process requests from users for Birthday plots.

11. The class descriptions for the PA2 and PA3 classifications read as follows:

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.

PROGRAM ASSISTANT 3

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.

The term "paraprofessional" is defined in the PA position standards as:

A type of work closely relating to and resembling professional level work, with a more limited scope of functions, decision-making and overall accountability. A paraprofessional position may have responsibility for segments of professional level functions, but is not responsible for the full range and scope of functions expected of a professional position.

12. Other positions which provide a basis for comparison with the appellant's position are as follows:

- A. Maintenance and Communications Facility Program Assistant, MACC, Program Assistant 2, Sharon Jewell incumbent. Ms. Jewell's duties are performed within MACC's Network and Software services unit, Maintenance and Communications Facility, which maintains computer equipment and provides data communications services and equipment for UW-Madison. Ms. Jewell's duties include processing inquiries and work orders for equipment repair and communication line installation, assigning work orders to facility staff and monitoring progress, providing inventory control for computer parts, ordering and reordering items where appropriate, generating monthly reports of area activities, maintaining and reconciling financial records and collecting, organizing and entering data into data base regarding cable installation locations.
- B. Billing Office Lead Worker/Coordinator, MACC, Program Assistant 3, Patricia Williamson incumbent. Ms. Williamson coordinates and directs the day-to-day operation of the MACC Billing Office. This office, within MACC's Fiscal and Staff Services unit, is responsible for the establishment of projects, assignment of funds and project/user authorizations for the use of MACC's computing facilities. Ms.

Williamson's specific duties include lead work responsibilities for three classified employes, monitoring monthly bills, resolving requisition and purchase order problems, acting as primary "interface" with critical personnel in other MACC units, scheduling billing runs, responding to staff and user inquiries regarding office policies and procedures, acting as liaison with other UW System campuses for billing purposes, and formulating and revising billing system and office policy and procedure. This last responsibility represents approximately 30% of her time.

C. Department Secretary, Department of Counseling and Guidance, School of Education, UW-Madison Campus, Program Assistant 3, Colleen Cooley incumbent. Ms. Cooley's position is summarized as follows:

Serves as a constant administrative coordinator for the academic faculty and non-academic personnel. Responsible for training and coordination of classified persons and student assistants. Responsible for budget coordination for Department funds and The Guidance Institute 101, 128, and cash-sales funds as bookkeeper. Serves as a financial aid and fellowship specialist and assists the Chairman with certification of licensing counselors.

Ms. Cooley's specific duties include being responsible for all bookkeeping and budget coordination for the Department, the Guidance Institute and the Counseling Clinic. Ms. Cooley also performs a full range of duties related to her position as department secretary.

D. Administrative support position, Instructional Materials Center, School of Education, UW-Madison Campus, Program Assistant 3, Diane Robbins incumbent. Ms. Robbins's position is summarized as follows:

Performs administrative support work in the Instructional Materials Center under the direction of the Director and in Communication with two library specialists. The position includes office management, purchasing routines,

record keeping, staff procedural policies and payroll, and student supervision and training.

E. Program Assistant to the Director of Recreation Facilities, Department of Physical Education and Dance, UW-Madison campus, Program Assistant 3, Virginia Haas incumbent. Ms. Haas has sole responsibility for setting up and entering data in space assignment books for the Department's 22 recreational and instructional areas, prepares bi-monthly payrolls and bi-weekly bank deposits and prepares various letters, requisition forms and reports regarding personnel matters as well as programmatic functions.

F. Program Assistant, Waisman Center, UW-Madison campus, Program Assistant 4, Nancy Solterman incumbent. Ms. Solterman's position is summarized as follows:

Maintain a complex array of data in the computer (financial, personnel, inventory, space allocation, telephone publications, mailing lists, history of accounts) for the interdisciplinary departments physically housed within the Waisman Center on Mental Retardation and Human Development. Additionally, perform a variety of administrative duties related to the daily operational services of the Business Services of the Waisman Center.

Approximately 70% of Ms. Solterman's time is spent doing "computer terminal work," described as follows:

Meet with individuals within the Center to determine their needs. Once their needs are determined, I work with the WCMR computer facility to develop and debug programs for these needs.

13. The best comparisons to the appellant's position are the positions held by Ms. Jewell and Ms. Williamson.

14. The appellant's position is better described by the position standard for the Program Assistant 2 level and is more appropriately classified at that level rather than at the Program Assistant 3 level.



CONCLUSIONS OF LAW

1. This matter is properly before the Commission pursuant to §230.44(1)(b), Wis. Stats.
2. The appellant has the burden of proving that the respondents erred in denying her reclassification request.
3. The appellant has not sustained that burden.
4. The respondent's decision denying the appellant's reclassification was not incorrect.

OPINION

The appellant supplied substantial evidence regarding the events that lead up to the reclassification denial that is the subject of this appeal. The evidence showed that the appellant operated under some misunderstanding of the procedures for initiating a reclassification review. However, the only question presently before the Commission is as to the correctness of the respondents' ultimate reclassification decision. In order to review that decision the Commission has taken the available evidence and set out the appellant's duties as they existed for the six month period immediately prior to receipt of the reclass request by UW-Madison Personnel. See Pers 3.015(3), Wis. Adm. Code. In its review, the Commission is not restricted to only those position descriptions relied upon by the respondent in making its review and is free to determine what appellant's actual duties were during that period.

The definitions in the Program Assistant position standard identify only very generalized distinctions between the PA 2 and 3 levels. The PA 3 definition refers to "paraprofessional" work and states that PA 3 positions "devote more time to administration and coordination of program activities

than to actual performance of clerical tasks." Neither phrase is referred to in the PA 2 definition. A review of the appellant's job duties indicates that her work is not properly described as "relating to and resembling professional level work," (as the term "paraprofessional" is defined), and that she does not spend more time in "administration and coordination." Appellant's counter sales function (25%) and the bulk of her inventory control function (35%) are clerical in nature.

However, in light of the generalized distinctions set out in the respective classification levels, it is important to rely on comparable positions in reaching the ultimate decision raised by this appeal. In this case, the respondent argued that two comparable positions within MACC indicated that the appellant's position should remain at the PA 2 level while appellant argued that four positions from elsewhere within the UW campus supported reclassification to the PA 3 level.

The Commission concludes that the comparable positions within MACC (the Jewell and Williamson positions) are better comparables than the other UW-Madison campus positions identified by the appellant.

The best comparable is the Jewell position, even though Ms. Jewell performs no leadwork function. Ms. Jewell's inventory control function is quite comparable to the appellant's. Both employes generate similar monthly reports and have limited responsibilities for entering or generating computerized information on a computer. Ms. Jewell's responsibilities as work flow coordinator, also include many responsibilities that are comparable to those counter sales/service duties of the appellant. Therefore, a comparison with Ms Jewell's position strongly suggests that the appellant's position should also be classified at the PA 2 level.

The Williamson position is similar with the appellant's to the extent that they both serve a lead work function for a specific service provided to MACC personnel and users. Even though the service provided by the Billing Office can be considered comparable to the various auxiliary services provided by the appellant and her co-workers, the method of performance is not the same. Ms. Williamson's PD indicates that most of her duties are administrative or coordinative and that she does not spend much time actually performing clerical functions. Specifically, Ms. Williamson allots 30% of her time to formulate and revise policies and procedures for the billing system and the billing office. In contrast, the appellant's sole responsibility in the area of policy development is very minor in terms of both time and independence (see Task B3). Therefore, the appellant's position more properly belongs at a lower classification than Ms. Williamson's position, which is classified at the PA 3 level.

Although some similarities do exist and if viewed alone, they might provide sufficient evidence to justify reclassification, the other Program Assistant positions on UW-Madison campus that are relied on by the appellant are less similar to the appellant's position and are entitled to less weight. Both the Cooley and the Robbins positions perform the very broad range of functions normally associated with departmental secretaries. In light of the breadth of their responsibilities, it is difficult to pick out specific functions as being similar to the functions performed by the appellant. The Haas position is somewhat different because 50% of her time is spent on setting up and maintaining the recreation facility assignment books. Ms. Haas is solely responsible for that function. The remaining 50% of her time is taken up with duties that are similar to department secretary

responsibilities. A distinction can be drawn between the appellant's position and the Haas position to the extent that the appellant is not solely responsible for the majority of her duties. However, the Haas position does appear to be a stronger comparable than the Cooley, Robbins or Solterman positions. The latter position, classified at the PA 4 level, consists predominantly of "computer terminal work" that involves developing and debugging programs. Relatively few similarities exist between it and the appellant's position.

A weighing of the Jewell, Williamson, and to a lesser extent, the remaining comparables, indicates that the appellant's position is more appropriately classified at the Program Assistant 2 level.

ORDER

The respondent's decision denying the appellant's reclassification request is affirmed and this appeal is dismissed.

Dated: January 20, 1983

STATE PERSONNEL COMMISSION

  
DONALD R. MURPHY, Chairperson

  
LAURIE R. McCALLUM, Commissioner

KMS:ers

JAMES W. PHILLIPS did not participate in the consideration or decision in this matter.

Parties

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