

May 28, 2010

TO: Charito Martin

FROM: Teresa Parsons, SPHR
Director's Review Program Supervisor

SUBJECT: Charito Martin v. Department of Personnel (DOP)
Allocation Review Request ALLO-09-062

On April 14, 2009, I conducted a Director's review conference regarding the allocation of your position. In addition to you, the following individuals participated in the conference: Carol Wyckoff, Customer Support Manager and your supervisor at the time relevant to this review; Katie Gerard, Human Resources Director; and Kerry Longhorn, Human Resources Consultant.

Director's Determination

This position review was based on the work assigned, as described in the updated Position Description Form (PDF) for your position, signed July 1, 2009. As the Director's designee, I carefully considered all of the documentation in the file, the exhibits presented during the Director's review conference, and the verbal comments provided by both parties. Based on my review and analysis of your assigned duties and responsibilities, I conclude your position is properly allocated to the Communications Consultant 2 classification.

Background

On July 9, 2009, the Human Resources Office received an updated PDF, which you and your supervisor signed on July 1, 2009. Ms. Longhorn reviewed the duties described on the PDF along with the Job Analysis Record completed by your supervisor, which reflected the duties assigned to your position. On September 14, 2009, Ms. Longhorn notified you that your Information Technology Specialist 3 (ITS 3) position was being reallocated downward to the Communications Consultant 2 (CC 2) classification. Specifically, Ms. Longhorn determined the majority of your duties managing the content of web pages for the HRMS support website best fit within the Communications Consultant class series concept at the Communications Consultant 2 level.

On October 12, 2009, you requested a Director's review of DOP's allocation determination. The following summarizes your viewpoint as well as your employer's:

Summary of Ms. Martin's Perspective

For the time period leading up to the reallocation of her position, Ms. Martin describes work managing two websites, the Customer Support Website and the On-Line Quick Reference (OLQR) website. Ms. Martin describes the websites as critical to business processes for broadcasting and depositing critical and time sensitive end-user information and instruction to Human Resource Management System (HRMS) and payroll users statewide. Further, Ms. Martin asserts that she served as a member of DOP's Web Tactical Team for the department's upgrade to the new website and that she had been heavily involved in all aspects of the upgrade. While Ms. Martin agrees the web tools and applications used to maintain the websites changed when the department moved to the new website, she contends the nature and variety of her duties did not change. As a result, Ms. Martin believes the ITS 3 is the appropriate allocation for her position.

Summary of DOP's Reasoning

DOP clarifies that the department's new website went live in March 2009. DOP acknowledges Ms. Martin previously managed and maintained the Customer Support and OLQR websites and that she served as a liaison between DOP and the vendor for the InfoPak application used to maintain the OLQR. However, DOP indicates Ms. Martin no longer had responsibility for the InfoPak application after the department moved to the new website. Instead, DOP indicates Network Services performs the technical programming/coding functions for the OLQR. DOP recognizes Ms. Martin's efforts in transferring data from the old websites to the Payroll section of the new website, as well as her work maintaining the web pages for that portion of the website. However, DOP asserts the primary focus of Ms. Martin's duties involves the display of content on the web pages. DOP emphasizes Ms. Martin uses the Microsoft SharePoint Web application as a tool to edit/update web pages but has not been assigned technical responsibility for the application. As a result, DOP contends the overall duties and responsibilities assigned to Ms. Martin's position fit the definition and distinguishing characteristics of the Communications Consultant 2 classification.

Rationale for Director's Determination

The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and responsibilities of the position. Little-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

Duties and Responsibilities

In summary, the July 2009 PDF describes your position's objective as follows (Exhibit B-2):

The primary responsibility of this position is to develop, design and maintain the structure and functions of the HRMS Support Website using the Microsoft SharePoint Web Editing Tool. This website communicates necessary personnel/payroll system information and materials to HRMS customers and end users to support . . . processing of personnel and payroll actions. . . . Works with the DOP web development unit and business owners creating web pages to ensure [adherence] to the department's best practices in web development. As a member of the DOP Web Tactical Team, this position is responsible for performing hands-on web content, updates, on-going maintenance and posting content to the web site.

. . . provides critical support to internal staff that use the On Line Quick Reference (OLQR) to build and house instructional content. Provides training to back up staff for supporting OLQR processes and procedures for creating, updating, uploading, and converting new or updated information prior to publishing, and ensures that process and procedural instructions are in place and clearly communicated. Checks the site periodically to ensure links or uniform resource locator (URL) and downloading processes work as expected . . .

The primary work activities indicate that your position maintains the HRMS Support Web site and On-Line Quick Reference (OLQR). In summary, the duties described include the following:

HRMS Support Website (40%)

- Developing, designing, and maintaining the structure and function of the website by using Microsoft SharePoint Web editing tool, a web based application supported and used through a web browser.
- Managing the HRMS support website to ensure consistency with the department's best practices and standards, as well as being responsive to customer needs.
- Creating folders and maintaining web files within the Site Collection Documents database.
- Collaborating with web development unit and business owners in creating web pages.
- Communicating and ensuring information exchanged includes all key stakeholders following the approval process.

- Designing and maintaining related subsites for specific program areas such as help desk, payroll calendars/schedules, and business intelligence.
- Converting and publishing all electronic and data files into different types and formats.
- Identifying and establishing linking relationships to other relevant websites or other documents.
- Archiving old HRMS messages and creating files for back up purposes; maintaining files and folders in Site Collection database and shared drives for backup and archiving purposes.

OLQR (20%)

- Developing and maintaining the structure and functions of OLQR web pages and subsites.
- Coordinating, creating, and updating OLQR documents.
- Developing, designing, and maintaining all OLQR subsites such as user procedures and HRMS reports, as well as functional areas and role pages; setting up bookmarks within page that allows direct links to related text and other data.

Additionally, 25% of your work activities include resolving day to day basic technical problems relating to the SharePoint web editing tool and consulting with higher level technical staff when needed. Your position also develops and maintains a variety of technical documents and procedural instructions, such as creating and redesigning web pages and PowerPoint presentations, ensuring compliance with agency design standards. Further, 10% of your work includes serving as a member of the HRMS Customer Support; HRMS Training Response, and Web Steering Response Teams in Web Task Tracking, as well as providing backup support to the HRMS Techsite. Your position also serves as a member of the Web Tactical Team.

During the Director's review conference, Ms. Wyckoff explained that the business functions of the prior Customer Support and OLQR websites transferred to the Payroll tab on DOP's new website, which went live on March 17, 2009. After going live with the new website, the department discontinued the InfoPak application you had previously managed. While your position continued to manage the content of web pages in the Payroll section of the new website, the process for updating and maintaining the web pages changed. Instead of using InfoPak, which required more technical work from your position, you subsequently used the SharePoint editing tool to publish content on the Payroll section of the website.

You indicated that business owners wrote the content and you created the web pages, receiving approval from business owners before publishing the information on the website. You indicated that you edit, format, and convert files, for example from an Excel file to a

PDF file, and post information to the website using SharePoint. Your position also links information from the Payroll tab to other web pages and documents, such as payroll schedules/calendars and HRMS reports. Ms. Wyckoff noted that you work with a high volume of data and a number of web pages. She also noted that your position continued to perform some archiving and backing up of data due to the transition to the new website. While you included Performance Expectations that referenced the assignment of additional duties, both you and Ms. Wyckoff clarified that your position had never been assigned the new duties anticipated.

Class Specifications

When comparing the assignment of work and level of responsibility to the available class specifications, the class series concept (if one exists) followed by definition and distinguishing characteristics are primary considerations. While examples of typical work identified in a class specification do not form the basis for an allocation, they lend support to the work envisioned within a classification.

The **Information Technology Specialist** class series concept includes the following:

Positions in this category perform professional information technology systems and/or applications support for client applications, databases, computer hardware and software products, network infrastructure equipment, or telecommunications software or hardware.

This category broadly describes positions in one or more information technology disciplines such as: Application Development And Maintenance, Application Testing, Capacity Planning, Business Analysis and/or Process Re-Engineering, Data Base Design And Maintenance, Data Communications, Disaster Recovery/Data Security, Distributed Systems/LAN/WAN/PC, Hardware Management And Support, Network Operations, Production Control, Quality Assurance, IT Project Management, Systems Software, Web Development, or Voice Communications.

Positions which perform information technology-related work to accomplish tasks but are non-technical in nature would not be included in this occupational category.

At the time relevant to this review, the majority of your duties involved the development, design, and maintenance of web pages within the Payroll section of DOP's website. Your position performed information technology-related work by using the Microsoft SharePoint Web Editing Tool to format and publish content on the website. You used the SharePoint tool to accomplish your work, but your position had not been tasked with the technical functions of programming, installing, or maintaining the application. Instead, your position worked with pre-defined templates to ensure consistency with agency standards. I understand that your previous work managing the InfoPak tool required a greater degree of technical work, which included some programming functions. However, the majority of work assigned to your position in July 2009 was non-technical in nature. Therefore, the

Information Technology Specialist (ITS) class series is not the best fit for the duties and responsibilities assigned to your position.

I also reviewed the **Management Analyst** class series; however, your position has not been assigned responsibility for analyzing management problems, providing consultation, developing strategies, conducting research, formulating recommendations, or coordinating long-range planning activities. As a result, the Management Analyst class series does not fit the nature or scope of work assigned to your position.

The **Communications Consultant** class series concept indicates that positions develop, edit and/or disseminate publications and a variety of communication and marketing materials as part of the overall public information function. This series also includes positions responsible for internal communications and strategic messaging. Your position fits within this class series because you develop, edit, and format content published on the department's website. Specifically, the content you publish on the Payroll tab communicates payroll system information and materials needed to support HRMS customers and end users who process personnel and payroll actions.

The **Communications Consultant 2** definition indicates that positions work independently and under general supervision. The duties include *performing original writing and/or editing assignments in the development and preparation of communication materials. Positions consult with clients and provide recommendations on things such as determining the most appropriate methods and techniques of designing and producing materials targeted toward a specific audience. Positions have increased responsibility in monitoring and expediting progress during production and ensuring conformity to standards of style and quality. Positions bring unusual problems or issues to higher-level staff with possible options or solutions.*

Your position manages the content of web pages providing HRMS support to customers via the Payroll section of DOP's website. The primary focus of your position involves the display of content, while ensuring consistency with DOP's best practices and standards set by Communications. Your position works with business owners to review and edit content and then publishes information to the website using the SharePoint tool.

It is clear the work you performed on DOP's website has been highly valued by your manager and the department. A position's allocation is not a reflection of performance or an individual's ability to perform higher level duties. Rather, an allocation is based on the majority of work assigned to a position and how that work best aligns with the available job classifications. Overall, the majority of duties and responsibilities assigned to your position best fit the Communications Consultant 2 classification.

Appeal Rights

RCW 41.06.170 governs the right to appeal. RCW 41.06.170(4) provides, in relevant part, the following:

An employee incumbent in a position at the time of its allocation or reallocation, or the agency utilizing the position, may appeal the allocation or reallocation to . . . the Washington personnel resources board Notice of such appeal must be filed in writing within thirty days of the action from which appeal is taken.

The mailing address for the Personnel Resources Board (PRB) is P.O. Box 40911, Olympia, Washington, 98504-0911. The PRB Office is located at 600 South Franklin, Olympia, Washington. The main telephone number is (360) 664-0388, and the fax number is (360) 753-0139.

If no further action is taken, the Director's determination becomes final.

c: Kerry Longhorn, DOP
Katie Gerard, DOP
Lisa Skriletz, DOP

Enclosure: List of Exhibits

Charito Martin v. Department of Personnel

ALLO-09-062

List of Exhibits

A. Charito Martin Exhibits

1. Request for Director's Review October 12, 2009
2. Performance and Development Plan (PDP) Evaluation (7/08 to 6/09)
3. Performance and Development Plan (PDP) Expectations (7/08 to 6/09)
4. Snapshot of DOP Payroll – HRMS page.
5. Details supporting classification as Information Technology Specialist 3
6. Agency Allocation Determination letter September 14, 2009
7. Job Analysis Record (JAR) July 2009

B. Department of Personnel Exhibits

1. Email from Carol Wyckoff dated August 14, 2009 to Kerry Longhorn regarding Communication Consultant 1 position.
2. Position Description signed and dated 7/2009
3. Job Analysis Record date stamped July 2009
4. Position Description for # 0367 dated August 2008
5. Position Description for #0306 (Communications Consultant 3)
6. Position Description for #0046 (Communications Consultant 4)
7. Position Description for #0117 (Communications Consultant 4)
8. Position Description for #0043 (ITS4)
9. Management Analyst 1 Class Specification (109I)
10. Information Technology Specialist 1 Class Specification (479I)
11. Information Technology Specialist 2 Class Specification (479J)
12. Information Technology Specialist 3 Class Specification (479K)
13. Information Technology Specialist 4 Class Specification (479L)
14. Communications Consultant 1 Class Specification (197I)
15. Communications Consultant 2 Class Specification (197J)
16. Communications Consultant 3 Class Specification (197K)
17. Communications Consultant 4 Class Specification (197L)
18. Communications Consultant 5 Class Specification (197M)