

June 19, 2009

To: Teresa Parsons  
Director's Review Program Supervisor

FROM Meredith Huff, SPHR  
Director's Review Investigator

SUBJECT: Carmyn Shute v. Parks and Recreation Commission (Parks)  
Allocation Review No. ALLO-08-024

#### **Director's Review Conference**

Ms. Carmyn Shute requested a Director's Review of her position's allocation by submitting a Request for Director's Review received April 7, 2008. On April 28, 2009, I conducted a Director's review conference by phone. Present by phone were Ms. Shute, employee; Mr. Steve Shively, Program Specialist 4, Ft. Worden State Park and Ms. Shute's second-level supervisor; Mr. Dave Pardy, Senior Field Representative and Ms. Kathy Andrus, Classification Director, WFSE, representing Ms. Shute; and Mr. Joe Vilades and Mr. George Price, Human Resource Consultants, representing Parks.

During the review conference Mr. Vilades talked about a revised Classification Questionnaire (CQ) that provided further details for the 85% work time of Ms. Shute's position. He explained he received the revisions in response to e-mail questions he had directed to Ms. Thomas, Ms. Shute's supervisor. Mr. Vilades had not included the e-mail questions or the revised CQ as exhibits. Mr. Pardy and Ms. Andrus expressed concerns about the information which they had not had an opportunity to review and make comments. Mr. Shively expressed concern that he was unaware that Mr. Vidales requested additional information about the CQ. He noted that he was not involved in the CQ revisions, had concerns about its accuracy and pointed out that Ms. Thomas submitted the revised CQ without his signature. I requested Mr. Vilades to provide copies of the e-mail questions and revised CQ to all parties for review and written comment. (Exhibit 2-H)

#### **Director's Determination**

The Director's review of Parks' allocation determination of Ms. Shute's position is complete. The review was based on written documentation, classifications and

information gathered during the review conference. As the Director's investigator, I have carefully reviewed all of the information provided and concluded that on a best fit of her overall duties and responsibilities, Ms. Shute's position should be reallocated to the Conference Coordinator 3 class.

Ms. Shute's supervisor and other co-workers submitted letters in support of Ms. Shute's position review. All the letters are very complimentary of Ms. Shute's work. Although such support is valuable, the letters are not allocation criteria and were not considered in this review.

### **Background**

Ms. Shute works in the Ft. Worden State Park's Conference office. Ms. Shute believed her position should be reallocated from Customer Service Specialist 2 to Customer Service Specialist 3. The following are the submitted CQs and related material.

- Classification Questionnaire (CQ) for Ms. Shute's position, #1226, submitted on November 21, 2007 to the Parks' Human Resources office. The supervisor section of the CQ is signed by Ms. Thomas, Customer Services Supervisor 4, immediate supervisor, and Mr. Larry Fairleigh, AD. (Exhibit 2-D)
- CQ labeled as resubmitted on March 19, 2008. This CQ is signed by Ms. Shute and Ms. Thomas. (Exhibit 1-F)
- Job Analysis Summary, which is not signed, submitted to Human Resources on April 25, 2008. (Exhibit 1-I)
- Position Review Request (PRR) submitted April 25, 2008 to Human Resources. Mr. Shively and Ms. Kate Burke, Fort Worden Area Parks Manager, signed this document as supervisor and unit head, respectively. (Exhibit 1-J)
- E-mail dated January 22, 2008, Mr. Vidales' request to Ms. Strizic-Thomas, immediate supervisor, for further details of the 85% time on the Ms. Shute's CQ, Exhibit 2-D. Ms. Strizic-Thomas responded with a revised CQ on March 5, 2008. (Exhibit 2-H)

By letter dated March 11, 2008, Mr. Vidales notified Ms. Shute that her position was properly allocated as a Customer Service Specialist 2 and denied her request for reallocation to the Customer Service Specialist 3. (Exhibit 2-A) On April 7, 2008, Ms. Shute submitted a Request for Director's Review form that noted the Conference Coordinator 3 class best described her position. (Exhibit 1-a) During the review conference, Mr. Vidales confirmed the review period for Ms. Shute's position is at least six months prior to November 21, 2007.

### **Summary of Ms. Shute's comments**

Ms. Shute explained that she is a senior customer service specialist for the Fort Worden Conference Center at Fort Worden State Park. During her supervisor's absence, Ms. Shute is the most experienced person available and she leads CSS1s and Park Aides, answers their questions, and provides information. She estimated she is the senior/lead employee for about 70% of her work time. Ms. Shute noted she was contacted frequently by a Cama Beach employee for instruction and direction in how to handle phone calls, perform functions on the reservation system, and conduct night audits and

posting and billing. She confirmed that her immediate supervisor has days off on Thursday, Friday and Saturday and frequently has meetings on Wednesdays and other days. Ms. Shute is the lead person during those times.

Ms. Shute estimated that there are as many as 200 conferences in a six months' period. She indicated that she often is working with group leaders and guests who have never done a conference before. She arranges food service including special/diet meals and water/coffee service, sets up and reserves housing accommodations, organizes stretch breaks, deals with crowded rooms, plans recreational events and oversees receiving payments. In working with conference and convention groups, she actively works to fill the spaces efficiently so they are not over or under used. For example, she would not assign a group of one person to a three bedroom house if a smaller house was available; nor would she assign a group of 12 to a meeting room for 200. She daily reviews the resources assigned and not assigned for the best use. Ms. Shute talked about multi-dimensional processes/procedures that she deals with in arranging conferences; some must be dealt with promptly. She often works with the local community to resolve issues around transportation from the airport (there is no airport at Fort Worden), local transportation (limited taxi/shuttle service), a need for more meeting spaces and medical situations or emergencies. In addition she frequently must deal with ADA issues, wheelchair access and Seeing Eye dogs.

Ms. Shute discussed her responsibility for independently creating proposals for conferences in response to requests. In some situations, she coordinates with the community to cover all the proposal's needs. She indicated that Mr. Shively will review the proposal to ensure that the outside services/items can be requested. Following an event, Ms. Shute is responsible to do post-event evaluations which assist in improving future events.

Ms. Shute stated she independently determines how to resolve client complaints, including giving legitimate refunds or offering discounts. She weekly reviews the meal plans and independently works with food service to provide better service, such as staggering meals. Ms. Shute noted that she daily checks in and talks with conference participants. This allows her to gain information on how the guests are doing, if there are any concerns, and perhaps may increase business.

Ms. Shute confirmed that not all conferences are with state agencies. She indicated that TILTH Producers (organic farmers), Back Country Horsemen, FDA programs, and Alternative Arts are a few of the many organizations that hold conferences at Fort Worden and it is her responsibility to handle those conferences. Ms. Shute defined a conference as a group of 32 or more people who stay overnight at Fort Worden.

Ms. Shute verified that she actively reaches out to the local community groups, such as Kiwanis and Port Angeles Chamber of Commerce, to help resolve problems and to spread the word about Fort Worden Conference facilities and programs. She also discussed her attendance at marketing, trades and wedding shows. At the shows she provides information and answers questions about Fort Worden Conference Center and

the other state parks and their resources. She also provides information about Parks regulations and policies.

Ms. Shute explained she is a resource person for the CSS1s and Park Aides that do the campsite reservations using the SMS Host computer system. Ms. Shute noted that accuracy is extremely important and stated that one mistake is detrimental for reservations in a number of ways, i.e. an error could mean the wrong Park, housing, and dates recorded.

Ms. Andrus expressed her disagreement with Mr. Vidales' determination. She noted that she finds the Customer Service Series to be a "catch all" class that does not describe the complexity of Ms. Shute's work in handling conferences. Due to the fact that the Fort Worden conference business has grown, Ms. Shute is now independently doing the same duties as her supervisor, except for supervision. Ms. Andrus observed that setting up a conference is more than just making reservations; it has intricate pieces and details which Ms. Shute independently handles. Mr. Shively reviews only the outside boundaries for community involvement which Ms. Shute arranges. Ms. Andrus and Mr. Pardy, on behalf of Ms. Shute, confirmed their beliefs that Ms. Shute's responsibilities are at a higher level than Customer Services Specialist 2 and proposed the Conference Coordinator 3 is a better class for Ms. Shute's position.

#### **Summary of Supervisor's comments**

Mr. Steve Shively confirmed that Ms. Shute is assigned to handle the external, larger and more-complex conferences and groups, coming to Fort Worden Conference Center, due to her past successes and her abilities to resolve problems and issues. He specified that Ms. Shute's responsibilities go beyond processing reservations. He emphasized there is great complexity in scheduling a groups' housing, housekeeping, food services, meeting rooms, audio/video equipment, etc., which Ms. Shute effectively aligns and handles. He stressed that she is the single point of contact for external conferences. He confirmed that Ms. Shute frequently provides lead responsibilities and the CSS1s and Park Aides go to her for assistance. Mr. Shively emphasized that Ms. Shute independently manages large and complex conferences, including those for outside groups, which require her to accomplish and finalize a large volume of complicated arrangements and schedules.

#### **Summary of Parks' comments**

Mr. Vidales noted that marketing and trade shows and wedding shows are not considered "cross agency" as discussed in the Customer Service Specialist 3 class. He noted that cross agency would be problem solving across divisions in Parks. He observed that examples of cross agency problem solving were not evident in Ms. Shute's CQ. He noted that in her letter to Ms. Daniels, Ms. Shute indicated she was not approached to resolve cross-agency issues. (Exhibits 2-D and 2-G). Mr. Vidales also pointed out that the CSS2 class indicates that the incumbent may lead other staff.

Mr. Price indicated that some examples of Parks' cross-agency programs are the Boating and the Winter Recreation programs.

Mr. Vidales noted he had reviewed the Conference Coordinator 2 class and found that Ms. Shute's scope of duties did not reach the level of the Class Series Concept.

Mr. Vidales stated that Ms. Shute's position falls within the Customer Services Specialist 2 class as she does not do cross-agency work and she does make campground reservations. He indicated that the decision explained in the determination letter stands based on a best fit of the work assigned to Ms. Shute's position.

### **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 accomplished, 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. See Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

The Board has consistently held that "When there is a definition that specifically includes a particular assignment and there is a general classification that has a definition which could also apply to the position, the position will be allocated to the class with the definition that includes the position" Mikitik v Depts. of Wildlife and Personnel, PAB No. A88-021 (1989).

Further, the PRB has concluded that while one class appeared to cover the scope of a position, there was another classification that not only encompassed the scope of the position, but specifically encompassed the unique functions performed. Alvarez v. Olympic College, PRB No. R-ALLO-08-013 (2008).

### **Classification Questionnaire (CQ)**

Ms. Shute works in the Conference Center at Fort Worden Park as the Conference Operations Coordinator. On the Classification Questionnaire, dated November, 2007 Ms. Shute lists her duties as follows, in part.

#### **85% of her work time:..**

- front line person representing the agency and park to customers ...process reservations for conference groups which include housing accommodations, meeting room rentals, and campsite reservations ...act as sales representative and must have good knowledge of all Park facilities and programs....
- Under direction of the CSS4, I process reservation requests for the conference center using the SMS Host computer reservation program...generate custom correspondence for groups, meeting room and housing reservations...have full knowledge of full range of activities involved in serving large meetings and in managing a visitor facility,...including a variety of meeting room setups, audio/visual

services, other internal building services and related off-premises services; knowledge of marketing techniques and procedures for visitor facilities.

- I assist and coordinate group leaders with planning, arranging coordinating a variety of services for events such as single and multi-day conferences, seminars, workshops, small and up to very large weddings and family reunions... in organizing their accommodation and meeting space needs, offer choices and assist with outside vendors...to facilitate particular needs, assist with coordination and development of their conference and food service budgets, direct them in proper registration...and any other services ...needed...[for a] successful event.
- ...prepare and reconcile invoices and statements for conference center clients, monitor payments ...process payments...make arrangements of special payment schedules...monitor conference deadlines and ensure all staff are advised of special needs, facility arrangements and A/V needs, dining facility and catering arrangements are completed...Assist in the development of ...operational/ administrative processes for...effective and efficient utilization of Conference Office. ...represent and market our conference services to our community...participate in trade shows...process and reconcile daily cash receipts....answer general park information and give directions to park visitors.

**13%** ...perform special projects for the conference center ...[and] recreational housing office...assist the CSS1's and regularly act as the lead worker when the CSS4 is out...update information sheets, assist in maintaining conference and meeting room reservation files, process completed reservation statements/requests per Park policy, answer and generate correspondence pertaining to recreational housing and camping.... communicate with field staff and Rangers..

**2%** I perform all other duties as assigned.

Ms. Thomas signed the CQ as the immediate supervisor and noted the level of supervision she provides to Ms. Shute's position is "spot check basis only." Mr. Fairleigh, AD, also signed the CQ.

#### Classifications Reviewed

##### The Customer Service Specialist 1 (CSS1) (class code 102A)

The **Class Series Concept** for the Customer Service Specialist classes states:

*"Positions in this series provide assistance and problem resolution to agency clients/customers and are located in a designated customer service program. The **intent of the series is to assist clients/customers in identifying agency processes and procedures, resolving client/customer problems related to agency programs and interpreting agency related laws, policies and procedures.** Positions at all levels may be assigned lead or supervisory responsibility over lower level staff. This series is not clerical in nature. Clerical support duties are incidental to the total work assignment (less than 10%). Clerical support, for the purposes of this series, includes tasks such as maintaining filing systems, maintaining logs, updating computer or manual data systems, office and telephone reception, completing office forms, compiling and*

*completing recurrent reports, performing routine typing, copy work and preparing mailings.” (emphasis added)*

The **Class Series Concept** for the **Conference Coordinator series** (class code 111B) **states:** *“Positions in this series plan, arrange, and coordinate facility and logistical support for on- and off-site conferences, seminars, and workshops. Incumbents oversee operational detail support services and may have financial responsibility throughout the event including establishing budgets, selecting speakers, lodging, catering, security, publicity, materials, and equipment; negotiating with vendors; determining fees to charge participants; preparing and changing contracts; and collecting and refunding conference fees. Coordination duties are usually complex in nature such as overseeing and monitoring compliance with applicable laws, regulations, policies, emergency procedures, and ADA compliance and making arrangements for large-scale, multi-state regional conferences and simultaneous unrelated conferences.*

***Incumbents make comprehensive arrangements for conferences and resolve all logistical problems that arise during events. Incumbents work with the latitude to make decisions independent of requesters regarding details such as budgets, charges, lodging, type of facility(ies), equipment, materials, speakers, food service, and additional event support services in on- and off-site facilities.***

*Incumbents typically establish conference and event budgets and negotiate rental fees and associated costs for on- and off-site events and establish competitive rates with the goal of recouping all costs, including overhead, negotiate revisions to contracts, and make determinations regarding refunds.” (emphasis added)*

The criteria for allocating a position are ordered by Class Series Concept, if any, class Definition, and class Distinguishing Characteristics. In addition, the former Personnel Appeals Board found that when a classification Definition specifically addresses a position, that position should be allocated to that class. (See Mikitik v Depts. of Wildlife and Personnel, PAB No. A88-021 (1989) The Personnel Resources Board upheld this concept in Alvarez v. Olympic College, PRB No. R-ALLO 08-013 (2008)).

The Class Series Concept of the Conference Coordinator classes specifically addresses responsibilities to “make comprehensive arrangements for conferences and resolve all logistical problems that arise during events... work with the latitude to make decisions independently of requesters regarding details such as budgets, charges, lodging, type of facilities, food service and additional event support services...” These are the responsibilities that jointly require a majority of Ms. Shute’s work time. I find the Conference Coordinator Class Series Concept, regarding making comprehensive arrangements for conferences, is more closely aligned with Ms. Shute’s assigned work and responsibilities as described in the CQ than the Class Series Concept of the Customer Services Specialist classes. The next step is to determine which level in the Conference Coordinator series is a best fit for Ms. Shute’s position.

Conference Coordinator 2 (CC2) (class code 111B)

The **Definition** of the **Conference Coordinator 2** states: *“Positions at this level work independently and follow generally defined methods to perform assigned activities. Incumbents typically provide detail support services for **single-day** conferences, seminars, and workshops. Incumbents review events and services to be provided for compliance with applicable laws, regulations, and policies; have financial responsibility for contracts negotiated and fees charged; and represent conference services to outside organizations and the community. **Incumbents assist higher level staff with longer, more detailed multi-day events.**”* (emphasis added)

I recognize there is an overlap of duties described in the CC2 with Ms. Shute’s assigned responsibilities. However, as described on the CQ and confirmed during the review conference, Ms. Shute’s responsibilities include independently providing detailed arrangements for conferences which entail one or more overnights. She independently handles the responsibilities of scheduling accommodations, food services, meeting rooms, transportation and other services for multi-day conferences rather than assisting higher level staff in these duties. The Conference Coordinator 2 is not the best fit for the responsibilities and duties assigned to Ms. Shute’s position.

Conference Coordinator 3 (class code 111C)

The **Definition** of the **Conference Coordinator 3** states in part: *“ Positions at this level work independently with limited supervision. Incumbents plan, arrange, and coordinate a wide variety of support services for events such as, complex single-day conferences, multi-day conferences, seminars, and workshops requiring complicated planning and coordination of details. Incumbents represent conference services to outside organizations and the community; plan and coordinate all support services for conferences and conference-related functions, seminars, and workshops;.. coordinate registration, make facility arrangements, negotiate services and costs, develop conference budgets, and process billing. Incumbents independently coordinate repeat programs and assist program leader with the development of new programs.”*

Although the **Typical Work** is not a criteria for allocation purposes, it does provide guidance on the scope of responsibility and breadth of impact of the incumbent of the CC3 position. The Typical Work for the CC3 includes the following, in part:

- Schedules meeting rooms, facilities, meals, lodging, and media equipment;
- Negotiates services and costs; develops contracts; plans and develops conference operations budgets; prepares and processes billing, ... and other fiscal transactions;
- Facilitates conference planning and evaluation ... plans and monitors conference deadlines;
- Oversees and monitors compliance with applicable laws, regulations, policies, emergency procedures, and ADA compliance during programs/events;

The majority of Ms. Shute’s work time is spent in activities to develop and support conferences and anticipating and dealing with a large number of conference connected details. Ms. Shute coordinates with conference leaders to organize accommodations and meeting spaces, contacts community vendors to meet specific needs, develops



conference and food service budgets, directs group leaders in proper registration areas and methods, and provides any other needed services to ensure a successful event. Ms. Shute prepares and reconciles invoices and statements, monitors payments, and when needed, arranges special payment schedules. Ms. Shute is authorized to adjust fees and to offer discounts in response to clients' concerns. Ms. Shute works with community businesses and organizations to provide services such as airport and local transportation and special housing accommodations. She meets with other Fort Worden staff to ensure that facility arrangements, food service/catering and A/V needs are met as scheduled. Ms. Shute independently develops conference proposals upon request. Mr. Shively reviews proposals to ensure that the arrangements with the local communities for services are appropriate.

Ms. Shute's position's scope of responsibility and assigned duties are encompassed within the Class Series Concept and the Definition and are supported by the Typical Work statements of the Conference Coordinator 3. Ms. Shute's position should be reallocated to Conference Coordinator 3.

### **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."*

### **Please note telephone and address changes:**

June 26 through July 3, 2009, the offices of the Director's Review Program and Personnel Resources Board Appeals Program will move to the Department of Personnel building located at 600 South Franklin in Olympia. Starting June 26, 2009, the main phone number for the two programs will be **360-664-0388**. The fax number remains the same, **360-753-0139**.

All requests for Director's Reviews and appeals to the Personnel Resources Board must be filed:

<b><u>In person at:</u></b>	<b>OR</b>	<b><u>By mail at: (unchanged)</u></b>
600 South Franklin		Mail Stop 40911
Olympia, WA 98504-7530		Olympia, WA 98504-0911

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

cc: Dave Pardy and Kathy Andrus, WFSE  
Joe Vidales and George Price, Parks  
Lisa Skriletz, DOP

Enclosure: Exhibits List

Exhibits List

**1. Carmyn Shute Exhibits**

- a. Director's Review Form April 2, 2008
- b. Allocation Determination letter from PARKS March 11, 2008:
  - A.** Gold Seal Award noting cross-agency customer service
  - B.** WA State Parks noting wedding program as cross-agency
  - C.** Staff Schedule noting this position as lead 70% of week
  - D.** Conference Proposal
  - E.** Classification Questionnaire Position #1226 November 2007
  - F.** Classification Questionnaire Resubmitted 3/19/08
  - G.** Position Review Request (#1226) form signed & dated April 18, 2008
  - H.** Job Analysis Record
  - I.** Job Analysis Summary
  - J.** Position Description Position # 0861 signed and dated April 18, 2008
  - K.** Letter of support from Steve Shively, PARKS, October 11, 2008
  - L.** Letter of support from Jill Cianne, PARKS, April 10, 2009.
  - M.** Letter of support from Steve Shively, PARKS, April 11, 2009.
  - N.** Letter of support from Kate Burke, PARKS, April 13, 2009.

**2. Parks and Recreation Exhibits**

- A.** Agency determination letter dated March 11, 2008
- B.** Customer Service Specialist 3 Classification Specs (class code 102C)
- C.** Customer Service Specialist 2 Classification Specs (class code 102B)
- D.** Classification Questionnaire for Position #1226 submitted November 21, 2007
- E.** Position Log Text March 11<sup>th</sup>, 2008
- F.** April 17, 2009 email from Joe Vidales protesting submission of April 2009 letter of support for Carmyn Shute
- G.** March 19, 2008 letter to Becky Daniels, PARKS from Carmyn Shute
- H.** March 5, 2008 email from Susan Strizic-Thomas, supervisor, with CQ attached with redistributed percentages of duties

**3. Follow-up Exhibits (submitted after conference)**

- A.** May 4, 2009 email from Kathy Andruss, WFSE to Joe Vidales, Park's RE: response to unsigned PDF (Exhibit 2-H above)
- B.** Parks' response to Kathy Andruss May 4, 2009 email (attached)

**4. Classes Reviewed by Directors Investigator**

- A.** Conference Coordinator 2 (class code 111B)
- B.** Conference Coordinator 3 (class code 111C)