

May 21, 2009

TO: Teresa Parsons, Supervisor  
Director's Review Program

FROM Meredith Huff, SPHR  
Director's Review Investigator

SUBJECT: Michele Johnson v Parks & Recreation Commission (Parks)  
Allocation Review No. ALLO 08-068

### **Directors Review Conference**

Ms. Michele Johnson requested a Director's Review of her position's allocation by submitting a Request for Director's Review form on September 23, 2008. On April 7, 2009, I conducted a Director's review conference by phone. Present by phone at the review conference were Ms. Michele Johnson, employee; Ms. Christy Sterling, Human Resources Operations Manager; Mr. Jose Vidales and Mr. George Price, Human Resources Consultants, representing Parks.

### **Director's Determination**

The Director's review of Parks' allocation determination of Ms. Johnson's position is complete. The review was based on written documentation, classifications and the information obtained during the review conference. As the Director's investigator, I have carefully reviewed all of the information. I conclude that Ms. Johnson's duties and responsibilities are encompassed in the Administrative Assistant 3 classification. Her position is properly allocated.

### **Background**

On August 11, 2008, Ms. Johnson requested a review of her position by submitting a Classification Questionnaire to the Parks Human Resources office. Ms. Johnson's position was allocated to the Administrative Assistant 3 class. Ms. Johnson indicated she believed her position should be reallocated to the Administrative Assistant 5 classification. The supervisor's review section of the CQ is signed by Jim Harris, immediate supervisor, and Scott Griffith, second level supervisor. (Exhibit B-2)

By letter dated August 26, 2008, Mr. Price issued an allocation determination indicating Ms. Johnson's position was appropriately allocated to the Administrative Assistant 3 (AA3) classification. (Exhibit B-1) Ms. Johnson requested a Director's Review of the findings by submitting a Request for Director's Review on September 23, 2008. (Exhibit A-1) Mr. Price confirmed that the time frame for this review is at least six months prior to July 25, 2008.

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

Ms. Johnson works in Parks' Eastern Region's office located in Wenatchee and reports to Jim Harris, Eastern Region Director.

Ms. Johnson described examples of her administrative functions as the Balanced Score Card and the GMAP reports which she completes for the Eastern Region. The accomplishments of the Eastern Region parks and interpretative centers are reported quarterly and Ms. Johnson compiles the quarterly reports into the year-end Balanced Score Card report. Ms. Johnson also compiles the GMAP report using quarterly information from the Region on progress toward reaching the Centennial goals. Ms. Johnson indicated that she compiles the report and creates a PowerPoint presentation using a template that is provided. Ms. Johnson explained that Mr. Harris provides review and final approval of the reports and presentations. She noted that Mr. Harris does any required presentations regarding the reports.

Ms. Johnson detailed her role in the Eastern Region's parks' attendance survey that records a random sampling of information on the number of park visitors, campers, vehicles, entries and re-entries and other information. She developed the initial instruction packets used to do the surveys. Ms. Johnson collected and displayed the parks' survey information in spreadsheets she created for each season (spring, summer, fall and winter). The purpose of the survey was to determine the accuracy of previously reported data on the use of the parks. The information is used by administrators to determine future park use and which parks will remain open or be closed.

Ms. Johnson discussed the No Child Left Indoors program for which she was assigned responsibility in the Eastern Region. She led a brainstorming group that discussed ideas that would get children outside. The group came up with the idea of sponsoring a children's rafting trip. Ms. Johnson was responsible for organizing the trip which included finding a local outfitter to provide kayaks and oversee the trip, arranging with the school district to provide transportation, and soliciting help from the local Rotary club. Ms. Johnson applied for a grant to fund the rafting trip but the grant was not awarded. Ms. Johnson indicated she is working with WSU and the Port of Chelan to assist with funding the trip. Due to issues of liability, the trip did not take place as planned; however, it is still in the works.

Ms. Johnson also talked about the State Comprehensive Outdoor Recreation Planning (SCORP) presentation she attended on behalf of her supervisor. The presentation was sponsored by the Interagency Committee for Outdoor Recreation and was focused on

discussing possible cooperative projects to receive federal funding. After the review conference, Ms. Johnson provided several web links to documents received at this meeting. (Exhibits C-1, 2, 3)

Ms. Johnson explained that complimentary and complaint letters regarding the Eastern Region's parks are directed to her for response. She composes and signs response letters to compliments. She composes and Mr. Harris signs letters that respond to complaints. Ms. Johnson emphasized that she prepares the forms and letters for confidential personnel matters and obtains necessary signatures. She noted she does not do investigations of personnel issues.

Ms. Johnson detailed her other duties as scheduling and making accommodation arrangements for the Region Managers' meeting every six weeks; interpreting and explaining the Region Director's views which normally involves answering staff questions about information provided at the Region Managers' meeting; and making arrangements for the Region Director to attend the Parks' Commission meetings. She provides information about permits and reservations to visitors; she notifies the Parks Deputy Director and the Director of emergencies such as floods, fires and fatalities in the parks; and she receives and confers with visitors, other agencies' representatives and private groups as necessary.

### **Summary of Parks' Comment**

Mr. Price noted that in reviewing the CQ, Ms. Johnson reports to Jim Harris, the Regional Director for the Eastern Region. Due to the reporting relationship, the potential for allocation to Administrative Assistant 5 is there. He noted that the AA1 includes secretarial and clerical work. After changes made in July 2007 to the class, the AA3 now also does secretarial duties. However, he observed that the AA4 and the AA5 do not include secretarial duties and that has been a problem for the Regional Directors. Mr. Price noted that on the CQ, under the 50% work time, several items on page 2 are secretarial work, i.e. appointment calendars, making travel arrangements, meeting deadlines, greeting visitors, mail distribution and routing, and composing correspondence. He observed that most duties listed under the 35% Liaison also are secretarial type of work. Mr. Price stated that Ms. Johnson's duties, including her secretarial responsibilities and functions, led to allocation at Administrative Assistant 3.

### **Rationale for Director's Determination**

A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which the 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 Personnel Resources Board (PRB) has held the following: "... because a current and accurate description of a position's duties and responsibilities is documented in an approved classification questionnaire, the classification questionnaire becomes the

basis for allocation of a position. An allocation determination must be based on the overall duties and responsibilities as documented in the classification questionnaire.” Lawrence v. Dept of Social and Health Services, PAB No. ALLO-99-0027 (2000).

In Allegri v. Washington State University, PAB Case No. ALLO-96-0026(1998), the Personnel Appeals Board (PAB) (predecessor to this Board) addressed the concept of best fit. The PAB noted that while the appellant’s duties and responsibilities did not encompass the full breadth of the duties and responsibilities described by the classification to which his position was allocated, on a best fit basis, the classification best described the level, scope and diversity of the overall duties and responsibilities of his position.

#### Glossary of Classification, Compensation and Management Terms

In reviewing this position, I have considered the following definition from the Department of Personnel’s (DOP) *Glossary of Classification, Compensation and Management Terms*. The *Glossary* is on the DOP website at:

<http://www.dop.wa.gov/CompClass/CompAndClassServices/Pages/HRProfessionalTools.aspx>.

**Nature of Work.** Basic types of work assignments performed by a class:

- Administrative – Determines or participates in making policy, formulates long-range objectives and programs, and reviews the implementation of programs for conformance to policies and objectives.

#### Classification Questionnaire (CQ) (Exhibit B-2)

Ms. Johnson submitted a completed Classification Questionnaire (CQ) signed July 25, 2008. (Exhibit B-2) As described on the CQ, Ms. Johnson’s primary responsibility is *“principal administrative assistant to the Eastern Region Director. This position is the liaison between Region, Parks and Olympia Headquarters staff and the public; makes decisions and acts for the supervisor in administrative matters; and accomplishes varied and complex administrative projects.”*

Ms. Johnson described those duties which occupy most of her work time, in part, as follows. The most important duties are underlined.

“**50%** Performs direct administrative functions for the Eastern Region Director. Administrative functions include but are not limited to: With delegated authority, performs higher level administrative duties, providing administrative support functions for the Eastern Region Director. This includes tracking of progress, assembly of quarterly status reports, and development of annual documentation and visual presentation associated with State Parks Accomplishment Report (SPAR/GMAP) and Balanced Scorecard for Eastern Region. Additionally this includes development and implementation of programs that support items in the Director’s annual contract with the State Park Commission and programs that assist in fulfillment of the Centennial Plan. Provides direct support to the Region Director. . .Coordinates assignments for region staff and Park Managers on behalf of the Region Director. Independently acts as an intermediary between the Region Director and Assistant Region/Park Managers and their staff ...requires total confidentiality of all personnel and sensitive issues... Is

responsible for keeping the Region Director's appointment calendar, setting up meetings and travel arrangements; attention to deadlines; distributes and routes mail, develops documents and processes confidential personnel matters; composes prepares, and edits correspondence for Region Director . . . Represents the Region Director at meetings, conferences and other events as necessary; speaks for the Region Director on administrative matters; assigns Region staff to attend in Region Director's place when necessary. Receives and confers with visitors and the public...

**35% Liaison:** for Region Headquarters, Parks, and Olympia Headquarters staff. Arranges hotel and meeting place accommodations for Park Managers' meetings and Commission meetings... Serves as ... Air Travel Coordinator for Eastern Region...setting up Region's Park manager meetings, selecting and arrangements for speakers, agenda, and minutes of the meeting...Supervises complaint letter files...

**10% Other duties:** Supports Region staff in development of Commission meeting agenda,... independently prioritizing work; compiling reports, studies, and applications; office record keeping or filing systems;... Distributes correspondence, memoranda and reports to Region Parks and Olympia Headquarters.

**5% Performs other duties..."**

Mr. Jim Harris, immediate supervisor, signed the CQ and noted exceptions labeled A, B, and C to Ms. Johnson's statements.

- Mr. Harris disagreed with Ms. Johnson's statement that she "Represents the Region Director at meetings, conferences and other events as necessary; speaks for the Region Director on administrative matters; assigns Region staff to attend in Region Director's place when necessary...." Mr. Harris noted "*does not occur.*"
- Mr. Harris disagreed with Ms. Johnson's statement that she, "Maintains and keeps current the following Region library reference manuals;..Commission Meeting data..., Agency Policies and Procedures; and Parks Management Plans." Mr. Harris noted this is "*now done electronically.*"
- Mr. Harris disagreed with Ms. Johnson's statement that she, "Keeps current and is knowledgeable regarding State Parks activities and is able to assist with obtaining answers to inquiries concerning permits and park fees, reservation system, volunteer program, boating, winter recreation activities, Special Activities, Commercial Recreation, and Filming in parks." Mr. Harris noted this is "*reassigned.*"

Ms. Johnson provided a rebuttal to Mr. Harris' exceptions on the Request for Director's Review (Exhibit A-1)

Mr. Harris noted that the level of supervision he provides to Ms. Johnson's position is "Little-employee responsible for devising own work methods."

Mr. Scott Griffith, Human and Finance Manager, signed the CQ as the Department Head. Mr. Griffith attached a list of terms used by Ms. Johnson and indicated the terms needed further definition for complete assessment of the CQ. (Exhibit B-2)

Administrative Assistant 5 (AA5) (class code 105I)

The **Definition** of the AA5 states: *“Principal assistant for administrative matters to a departmental head, agency director, or the head of a major subdivision of a major State agency. Accomplishes varied and complex projects; makes decisions and acts for supervisor in administrative matters.”*

Although the **Typical Work** statements are not allocation criteria, the following AA5 Typical Work statements, copied in part, provide guidance for the level of responsibility and breadth of impact for this class: *“. . .Coordinates major policy matters and agency programs within the agency and with other State, Federal, or local agencies; Represents supervisor at meetings, conferences, and conventions; speaks for him/her on agency matters; . . . Investigates operating methods and procedures employed in various agency functional areas and develops improved methods where indicated; Receives and confers with official visitors and the public; meets with representatives of government or private interest groups;.. Serves as liaison officer with the Governor's Office concerning public complaints or problems; investigates complaints...”*

Mr. Harris, the immediate supervisor, indicated on the CQ that Ms. Johnson does not represent him at meetings, conferences and other events and does not speak for him on administrative matters.

Ms. Johnson’s position is not responsible to “accomplish varied and complex projects; make decisions and act for supervisor in administrative matters” as identified in the Definition and at the level expected according to the guidance provided in the Typical Work statements. Ms. Johnson’s responsibilities are region level rather than agency-wide or state-wide. Her administrative assignments are important but limited to the area of compiling information and composing various reports and related presentations for the use of the Regional Director.

The level of responsibility and breadth of impact envisioned in the Definition of the AA5 are of a higher level than those assigned to Ms. Johnson’s position. The responsibilities assigned Ms. Johnson’s position do not reach the level anticipated in the Definition of the AA5 class. The Administrative Assistant 5 is not the best fit for the overall duties and responsibilities of Ms. Johnson’s position.

Administrative Assistant 4 (AA4) (class code 105H)

The **Definition** of the AA4 states: *“Positions serve as the assistant on administrative matters to the head of a state agency, the head of a major sub-division or major operating location of an agency, or to the chief administrator or head of a major organizational unit such as a school, college, or major academic/administrative department.”*

The **Distinguishing Characteristics** of the AA4 state, in part: *“Positions perform higher-level administrative duties of a substantive nature that are appropriate to be performed by the supervisor, manager, administrator, or professional level employee but have been delegated to the administrative assistant to perform. . . . For general*

*government positions, secretarial or clerical duties are incidental to the administrative functions performed. For those positions in a major organizational unit such as . . . administrative department, the "unit" will typically have more than 75 full-time equivalent professional and/or classified staff; . . . OR positions serve as both sole administrative support and the executive secretary reporting to the organizational head. These positions are assigned to major units, with institution-wide responsibility, that have no assistant directors, deans or managers who would share the administrative duties of the position."*

Ms. Johnson described the No Child Left Indoors program as an example where she represented the Regional Director at the brainstorming meeting; there were no additional meetings. She stated she coordinated with the school district and a local outfitting company to implement a rafting trip for children under the No Child Left Indoors program. The lack of funding and the liability issues prevented the rafting trip.

Ms. Johnson's position has not been assigned to be the assistant on administrative matters for the EW Regional Director. The responsibilities assigned to Ms. Johnson's position do not meet the definition of "administrative" as provided in the DOP *Glossary*. Ms. Johnson's position has region-wide responsibilities for compiling reports and scheduling Park Managers' meetings. Her position is not assigned agency-wide or state-wide responsibility. Ms. Johnson's position does not have the authority and responsibilities that are associated with the AA4 Definition and Distinguishing Characteristics.

Although Ms. Johnson's example of the No Child Left Indoors program may include some elements of the AA4, the overall duties and responsibilities of Ms. Johnson's position do not encompass the requirements of the Definition and the Distinguishing Characteristics of the AA4 class. The Administrative Assistant 4 class is not the best fit for Ms. Johnson's position's overall duties and responsibilities.

#### Administrative Assistant 3 (AA3) (class code 105G)

The **Definition** of the AA3 states: *"Positions perform varied administrative and secretarial support duties or positions are responsible for one or more major program activities under a second line supervisor."*

The **Distinguishing Characteristics** of the AA3 state: *"Positions are delegated higher-level administrative support duties or positions are delegated one or more major program activities that would be performed under a second-level professional supervisor, manager or administrator in WMS Band II or above or in exempt service, chief administrator, or head of a major organizational unit such as a school, college, or major academic or administrative department. Only one position will be allocated to an individual second-line supervisor for those positions performing one or more major program activities. . . . Areas may include but are not limited to, the following: budget development and/or management, expenditure control, office space management, equipment purchases, budget development and/or management, public relations, personnel administration, records management, and report preparation. Incumbents in*

*these positions represent the supervisor's and/or unit's goals and interests and provide interpretation or explanation of the supervisor's policies or viewpoints."*

Ms. Johnson's position fits within the Definition and Distinguishing Characteristics of the Administrative Assistant 3 classification. She has responsibility for the compiling and completing of a variety of reports for the Eastern Region, including the State Parks Accomplishment Report, Balanced Scorecard, GMAP, and Parks' Use reports. Ms. Johnson is responsible for collecting data and completing the Weekly Significant Incident Report, Holiday Park usage reports, Emergency On-Call Schedule, Park Staff Day-Off Schedule, Eastern Region Headquarters Staff Vacation Schedule, Parks Winter Closure Schedule, and the Region's status reports regarding fire closures and storm damage. Ms. Johnson also sets up the Region's Park Managers' meetings, including reserving accommodations, selecting speakers, forming agendas and distributing the minutes. She works with supervisors to provide assistance in confidential personnel issues such as performance evaluations and supervisory reviews, greets visitors, responds to requests for information, and provides assistance for the Assistant Region Managers when requested. Ms. Johnson provides secretarial support duties for her supervisor such as composing correspondence for his signature, making travel arrangements and maintaining his calendar.

Ms. Johnson's overall duties and responsibilities are encompassed best by the Definition and Distinguishing Characteristics of the AA3. The scope and level of responsibility and variety of secretarial support duties assigned to Ms. Johnson's position are best described by the Administrative Assistant 3 classification. Ms. Johnson's position is properly classified.

### **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 address for the Personnel Resources Board is 2828 Capitol Blvd., P. O. Box 40911, Olympia, Washington 98504-0911.

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

c: Jose Vidales and George Price, Parks  
Michele Johnson, Parks  
Lisa Skriletz, DOP

Enclosure: Exhibits List



**EXHIBITS LIST**

**A.** Filed by employee September 22, 2008:

1. Director's Review Request form submitted September 23, 2008.
2. Park's allocation determination letter dated August 26, 2008
3. Classification Questionnaire with one page attachment August 2008

**B.** Filed by George Price (Parks) November 26, 2008:

1. Allocation Letter dated August 26, 2008
2. Classification Questionnaire Position #0553, received by HR on 8/11/08
3. Administrative Assistant 3 Classification Specs (class code 105G)
4. Administrative Assistant 5 Classification Specs (class code 105I)

**C.** E-mails submitted after April 2008 conference:

From Ms. Johnson, containing hyperlinks to following exhibits:

1. Recreation Trends Survey webpage, 1 page.
2. December 19, 2007 SCORP document, 6 pages.
3. October 2002 SCORP document, 120 pages.
4. E-mails among Ms. Johnson, Mr. Price (Parks) and Ms. Huff (DOP) April, 2008