

May 1, 2007

RE: Robert Hunter v. Washington State University
Allocation Review Request HEU No. 4636

Dear Mr. Hunter:

On November 7, 2006, I conducted a Director's review meeting by telephone conference call regarding the allocation of your position. You, your supervisor, Gary Zentzis, and Kendra Wilkins-Fontenot and Kimberly Maupin with Human Resource Services at Washington State University (WSU) participated in the conference call.

Background

On January 30, 2006, you submitted a Washington State University Position Questionnaire, requesting that your Motorized Equipment Mechanic position (#039693) be reallocated to the Equipment Technician 3 classification. While the Motorized Equipment Mechanic class existed prior to January 1, 2006, that classification was replaced by the Automotive Mechanic classification when the Department of Personnel (DOP) implemented a class consolidation on January 1, 2006. Similarly, the Equipment Technician 3 class, which you believe best describes your position, replaced the old classifications of Motor Pool Manager, Equipment Analyst 1, and Equipment Mechanic 1. Therefore, the relevant classifications I considered were in the Motorized Equipment Operations & Repairs Occupational Category, including the Automotive Mechanic class, and the Equipment Maintenance and Repair Occupational Category, including the Equipment Technician 3 class.

In a memorandum dated May 3, 2006, Steve DeSoer, Executive Director of Human Resource Services, notified you that your position was appropriately allocated to the Automotive Mechanic classification because you perform work related to repair and service of automobiles and equipment for Motor Pool operations.

On May 31, 2006, the Department of Personnel received your request for a Director's review of WSU's allocation determination.

The following summarizes your perspective as well as your employer's:

Summary of Mr. Hunter's Perspective

You contend the majority of your work time (65%) is spent performing services and repairs on vehicles and equipment rated at 15,000 Gross Vehicle Weight (GVW). While you acknowledge you work on vehicles assigned to the motor pool, you state that other programs often send their vehicle and heavy equipment maintenance to the motor pool for service as well. You also contend that WSU's calculations of your time on vehicles above 15,000 GVW do not include all of the equipment listed in the Equipment Technician (ET) 3 position and assert that the majority of your time is spent working on equipment identified in the distinguishing characteristics and work examples of the ET 3 class. Additionally, you state that the list of heavy equipment provided by WSU (Exhibit E-8) identifies the equipment you work on most often but does not include equipment from other areas, which is identified by the letter J on the time sheets. You state that your salary is funded 50% from the Heavy Equipment budget and 50% from the Motor Pool Budget (Exhibit E-12) and believe your position should be reallocated to the ET 3 classification.

Summary of Washington State University's (WSU's) Reasoning

WSU asserts your position best fits the Motorized Equipment Operations & Repairs occupational category in the Automotive Mechanic classification. While WSU agrees that some of the heavy equipment identified by you is over 15,000 GVW, the University contends the majority of your work has been performed on vehicles less than 15,000 GVW and that less than 3% of your work over the six-month period, as identified on your time sheets (Exhibit E-7), could be related to major repairs. Instead, WSU describes the bulk of your duties as relating to maintenance and repairs of vehicles, light trucks, and motorized equipment and states that only about 20 pieces of equipment for the entire University can be considered over 15,000 GVW. Further, WSU asserts most of your assigned duties involve minor repairs like oil changes and/or ongoing maintenance as opposed to major repairs involving transmissions or engine repair work. Therefore, WSU believes your position is properly allocated as an Automotive Mechanic.

Director's Determination

This position review was based on the work performed for the six-month period prior to January 30, 2006, the date you submitted your position questionnaire to WSU's Human Resource Services.

As the Director's designee, I carefully considered all of the documentation in the file, the exhibits presented during the Director's review meeting and the additional exhibits sent

by both parties via email and regular mail, as well as 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 Automotive Mechanic classification.

Rationale for Determination

In considering your request, I first reviewed your Position Questionnaire (Exhibit A) in which you state that the position's purpose is to perform journey-level inspection, diagnoses, major and minor mechanical repairs, and preventive maintenance on all types of equipment. I then looked at the duties you identified as 65% of your total work, which include maintenance, inspection, diagnosis, and repair to equipment such as vehicles over 15,000 GVW. In the 65% section you identified the following pieces of equipment you service:

Specialty trucks, power shovels, graders, backhoes, dozers, heavy trucks and accessories, snow plows, sanders, loaders, rollers sweepers oil distributors, catch basin cleaners, garbage collection packers, forklifts, cranes, bucket trucks, and manlifts.

You further indicated that 25% of your time was related to the diagnosis and repair of light and medium duty trucks and automotives of gasoline, diesel and hybrid vehicles, as well as the operation of various pieces of shop equipment.

Your supervisor, Equipment Supervisor Gary Zentzis, disagrees with your statements on the Position Questionnaire. Mr. Zentzis states that your assigned work best matches the Automotive Mechanic class because you repair and service automobiles, vans/panel trucks and pickup trucks under 15,000 GVW, as well as motorized equipment and heavy construction or related equipment such as power generators, hydraulic system, and diesel engines (Exhibit B). Additionally, Mr. Zentzis notes that while you are authorized to make decisions on replacements of smaller, low-cost maintenance items for vehicles, you cannot make decisions regarding replacements of large, expensive maintenance items and you are not authorized to make decisions about work that is not previously approved.

Next, I reviewed your exhibits (E-3, E-4, and E-5) which included lists of vehicles and equipment, including those pieces that were assigned to other programs and were over 15,000 GVW. I also reviewed in detail the spreadsheet of your work time from July 2005 through December 2005, which indicated the piece of equipment and/or vehicle you worked on, the number of hours you spent performing the work, and whether the vehicle or equipment was over 15,000 GVW. I cross-referenced the assigned codes for each item with the lists of heavy equipment provided by both you and WSU.

As you indicated in your follow-up letter dated December 10, 2006 (Exhibit E-11), some of the heavy equipment items were outside of the motor pool and had a code beginning with the letter J. Those items were also included on the spreadsheet of your time and

were included in the number of hours spent working on vehicles/equipment over 15,000 GVW totaling 344.05 for the six-month period. I also compared a sampling of your actual time sheets (scanned and emailed to me by Kendra Wilkins-Fontenot, which I also forwarded to you) with the spreadsheet, and the time sheets I reviewed matched the data on the spreadsheet. Since you indicated there were only minor discrepancies with the time sheets/spreadsheet from WSU (Exhibit E-11) and because there were over 124 pages of time sheets, I reviewed the information sent via email on the computer screen and printed a select number from various months over the six-month period (Exhibit E-9). The information on the spreadsheet directly reflects your time sheets.

As you mentioned, there is no dispute that you perform maintenance and repairs on some heavy equipment over 15,000 GVW, which is supported by your time-keeping records and include, in part, the following pieces of equipment:

- 5130 83 Ford Ladder Truck
- 5160 91 Water Truck
- 5204 93 GMC Dump-top Kick
- 5211 92 Aerial Lift 65' Genie
- 5219 79 Chevy – Gas 2 Ton Van
- 5244 jcb loadall forklift
- 5257 96 Excavator, Caterpillar
- 5260 Loader, Kawasaki
- 5267 98 John Deere Backhoe
- 5439 98 15Ton Crane/F800

Also, equipment outside of the motor pool with work order (decal #'s) j4707; j4702; j3811; and j1501 to name a few.

When I reviewed the totals for each month, however, the highest number of hours devoted to equipment over 15,000 GVW in one month occurred in August 2005, which totaled 76.8 or 44% of your overall work time in that month. Even though you spent more time working on heavy equipment than light vehicles/trucks in that month, it still did not exceed more than 50% of your overall work time. Further, over the six-month period, there were months when you spent more time working on items less than 15,000 GVW. For example, in October 2005, you spent 96.55 hours or 56% working on vehicles less than 15,000 GVW, while you only spent 59.1 hours or 34% working on the heavier equipment. When reviewing the total number of hours spent performing maintenance and repairs on all vehicles and equipment (both under and over 15,000 GVW), your time records showed that 88% of your work time is devoted to performing these repairs.

Note: I based my calculations on information included on the Department of Personnel's website in the instructions for completing a Position Review Request (<http://www.dop.wa.gov/Resources/Forms/>) and included a copy as an attachment to this letter (Exhibit 16).

For example, the hours noted for August 2005 above were 76.8, and I divided that number by the monthly hours of 174 to reach the percentage of 44% ($76.8/174 = .44137$ or 44%). For the six-month period, the calculations are as follows:

174 hours per month x 6 = 1044 hours
Under 15,000 GVW 572.95 hours/1044 = 55%
Over 15,000 GVW 344.05 hours/1044 = 33%

While I understand the Position Description for position #039693, signed in January 2001, (Exhibit D) may be outdated, the items identified as 90% primarily relate to diagnosing and repairing vehicles and overhauling engines in automobiles, pickups and medium duty trucks. The amount of time devoted to those duties is comparable to the 88% of overall duties that relate to repairs, maintenance, and diagnosis of items both less than and more than 15,000 GVW. Although you may be performing more work on heavy equipment than noted in the Position Description, you still do not perform those duties more than half of the time.

The Washington State Classification and Pay Administrative Guide states that a position's allocation is based on a review and analysis of the duties and responsibilities of the position and is allocated **on a best-fit basis** as determined by the majority of work performed. In comparing a position's duties with the occupational categories, we first consider the category concept and then the distinguishing characteristics. The examples of work do not form the basis for an allocation; however, they may lend support to the work envisioned within a classification.

The category concept for the Motorized Equipment Operations & Repairs Occupational Category states, in part, that positions "perform service and repair of automobiles, motorized farm equipment, and heavy construction or related equipment." The Automotive Mechanic classification is included in the above occupational category, and the distinguishing characteristics read:

Perform the repair and service of automobiles, vans/panel trucks and pickup trucks under 15,000 GVW, motorized farm equipment and heavy construction or related equipment such as power generators, hydraulic systems, and diesel engines.

You are assigned to the motor pool, and your assigned work, as reflected on your timesheet information, shows you spend a majority of your time working on vehicles, vans, and trucks under 15,000 GVW. Although you do work on heavy equipment as well, this does not comprise the majority of your time. Additionally, the Automotive Mechanic class allows for work on motorized equipment and heavy construction related equipment.

The Equipment Maintenance and Repair Occupational Category states, in part, that positions “service and repair light and heavy wheeled and tracked vehicles, motorized farm equipment, and heavy construction or related equipment, and/or independently overhaul light air-cooled engines such as lawn mowers, and small electrical motors.” I recognize these occupational categories are similar in nature, and you do perform some of the duties described in each category concept. However, when I looked at the Equipment Technician series, I first considered the level of work you perform and determined you did not meet the Equipment Technician I because even though the distinguishing characteristics include repair of automobiles, the work is entry level, and you perform journey-level work. Next, I considered the Equipment Technician 2 and 3 levels. At these levels the work is journey-level and includes major and minor mechanical repairs and preventive maintenance on all types of equipment.

While I agree with you that minor repairs and preventive maintenance are included in the duties of Equipment Technician 2s and 3s, the distinguishing characteristics also include “major” repairs, adding more depth to the scope of work assigned. When I reviewed the types of repairs you performed (Exhibit E-7), the majority of work related to minor and preventive maintenance and includes work like servicing the vehicle/equipment; repairs to steering, gauges, hoses, wiper blades; equipment blades and buckets; oil/hydraulic and coolant leaks; battery and alternator repairs; heating repairs; throttle; breaks; air filter; fuel pump; and greasing machines. Although you may have the ability to perform major repairs, such as major engine overhauls, a position's allocation is based on the majority of work an incumbent is assigned to perform. Therefore, the Automotive Mechanic classification best describes your position #039693.

Appeal Rights

WAC 357-49-018 provides that either party may appeal the results of the Director's review to the Personnel Resources Board (board) by filing written exceptions to the Director's determination in accordance with Chapter 357-52 WAC.

WAC 357-52-015 states that an appeal must be received in writing at the office of the board within thirty (30) calendar days after service of the Director's determination. 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.

Sincerely,

Teresa Parsons
Director's Review Supervisor
Legal Affairs Division

c: Kendra Wilkins –Fontenot, WSU
Lisa Skriletz, DOP

Enclosure: List of Exhibits