

July 31, 2007

RE: Kristina Owens v. Central Washington University
Director's Review Request HEU No. 4638

Dear Ms. Owens:

On April 24, 2007, I conducted a Director's review meeting by telephone conference call regarding the allocation of your position. You and your supervisor, Lois Breedlove, Chair of the Communications Department, as well as Pam Zupan from Human Resources at Central Washington University (CWU), participated in the telephone conference.

Background

On December 21, 2005, you submitted a Position Review Request (PRR) to CWU's Human Resources Office asking that your Secretary Senior Position be reallocated to a higher-level position, possibly an Office Support Supervisor. On May 10, 2006, Ms. Zupan provided you with the results of your classification review. Ms. Zupan noted that both you and your immediate supervisor, Ms. Breedlove, confirmed the duties and responsibilities described in the PRR were in fact your assigned duties, which you were also expected to perform in the future. The job classes considered included Administrative Assistant A and B, Program Coordinator, Administrative Services Manager A and B, Secretary Senior, and Office Support Supervisor.

Ms. Zupan concluded the duties described in your PRR best fit the Secretary Senior classification and that it was the most appropriate allocation for the position of secretary to the Communications Department. Ms. Zupan also provided reasons why she believed this was the best fit as opposed to the other classifications (Exhibit E). For example, Ms. Zupan did not believe the duties assigned to your position fit either the Administrative Services Manager or Administrative Assistant A and B job classes because she determined your position did not report directly to a "senior academic or administrative official." Further, she concluded the Administrative Services Manager class specification referenced a budget much higher than that of the Communications Department.

Ms. Zupan also indicated the Program Coordinator class was not appropriate because she did not believe your position was contained within a specific program, defined as a specialized area relating to a particular subject. Finally, while Ms. Zupan agreed your position fit within the Clerical, Office Support, and Secretarial Occupational Category, she concluded the supervisory duties assigned to your position did not meet the 1 FTE standard traditionally used by higher education.

On June 5, 2006, the Department of Personnel received your request for a Director's review of Ms. Zupan's determination.

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

Summary of Ms. Owens' Perspective

You assert the duties and responsibilities assigned to your position have changed over the past few years. For example, you state you now supervise the department office and oversee the work of student employees with overlapping shifts who perform a variety of clerical duties and special projects for faculty members. As such, you assert you make hiring decisions, meet with the student employees regularly to evaluate work, and train those individuals on a variety of office procedures. You further assert the student employees report to you when any problems occur in the office. You state you also enter payroll data as a backup to the Business Manager.

In addition, you contend you perform budget and office management duties related to expenditure, purchasing, and payroll control. For example, you assert that you enter and monitor daily expenditures and perform monthly budget reconciliation. Also, you assert part of your responsibility includes monitoring the budget to ensure expenses do not go over budget, while also balancing the needs of the department. You state you also coordinate with the academic scheduling center to get curriculum scheduling completed for your department, including classrooms and scheduled time for faculty in your department. You contend you independently make decisions regarding office administration and operations and work with the department chair and faculty on special projects like planning and organizing seminars and arranging travel for guest speakers. Therefore, you believe you are performing duties that go beyond the level of the Secretary Senior classification.

Summary of CWU's Reasoning

CWU acknowledges the Secretary Senior class is not a perfect fit for your position but contends it is the best fit based on the available classifications. During the Director's review conference, Ms. Zupan acknowledged that you supervise student workers, which she described as typical for most secretaries at CWU due to the volume of work. At the same time, Ms. Zupan reiterated her belief that your supervisory duties did not meet those of a typical supervisory position because she stated your position's primary purpose had been to provide support to the Communications Department. In other words, CWU does

not believe your position exists to supervise. Further, CWU contends the total work hours of student employees you supervised did not reach a full 40-hour week (Exhibit F). Therefore, CWU contends you do not meet the definition of a supervisor as traditionally viewed in higher education as requiring supervision of one full-time employee. For this reason, and those summarized earlier and also stated in Ms. Zupan's classification determination, CWU believes the Secretary Senior classification is the best fit for your position.

Director's Determination

This position review was based on the work performed for the six-month period prior to December 21, 2005.

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 should be reallocated to the Administrative Assistant A classification. For your information, the Administrative Assistant 3 class replaced the Administrative Assistant A class, effective, July 1, 2007.

Rationale for Determination

It is undisputed that the duties and responsibilities outlined in the PRR (Exhibit A) accurately describe your position. Additionally, the duties described in the PRR are consistent with those described in your Position Description Form (Exhibit C). Your position's purpose reads as follows:

The primary purpose of this position is to facilitate the administration of the department which includes managing, planning, organizing, implementing, and coordinating all administrative services for the department, exercising independent judgment and decision-making authority.

Additionally, your position's purpose indicates that you serve as the Assistant to the Chair, ensuring that appropriate policies and procedures are followed when implementing administrative needs while working directly with the Chair to plan department needs. Your position also performs budget and office management; contract monitoring; department space planning; technology support; expenditure, purchasing, and payroll control; student services; office management; public relations; student supervision; academic planning, analysis, and scheduling; records management; and report preparation. Ms. Breedlove, the Communications Department Chair and also your supervisor, confirmed your administrative role during the Director's review conference.

In reviewing your duties identified as 62% on the PRR, the majority of your assigned work fits administrative support work rather than secretarial or clerical. Administrative

work can be described as “determining and/or actively participating in making policy, formulating long-range objectives and programs, and reviewing the implementation of programs for conformance to polices and objectives” (Washington State Classification and Pay Administrative Guide). In addition to providing direct secretarial support to the Communications Department Chair, you provide administrative support for three instructional programs within that department consisting of regular, adjunct, and contracted faculty members. Some examples of the administrative support functions you perform, as listed in the Job Duties section of the PRR, include the following:

- Work independently as Academic Department Office Supervisor making decisions regarding office administration and operations to include: assisting in the implementation of special projects and grants, executing complex multi-level administrative tasks, solving problems, and advising and implementing actions to facilitate efficient operations;
- Work with Chair on decisions regarding modification of department procedure and on matters affecting operations and the welfare of faculty and students;
- Coordinate Chair's faculty and adjunct instructors' needs and requests;
- Prepare quarterly Contract Request forms for Adjunct Instructor contracts;
- Work with Department Chair in editing/preparing and submitting the catalog copy;
- Process administrative forms from other departments such as Accounting, Registrar's Office, Advising, and Academic Dean's Office.
- Prepare Standard Agreement forms for guest speaker's honorariums, making all arrangements for presentations and including guest needs such as travel arrangements.
- Maintain website for department;
- Public Relations to include acting as a representative of the Communications Department; maintaining ongoing contact with students, parents, faculty, and staff; designing and preparing brochures; and maintaining the department bulletin boards.

Additionally, you are the purchaser and reconciler of expenses on the ProCard, and you have the authority to purchase items online form Corporate Express using ProCard. Other budgetary duties include monitoring reconciling, initiating, and approving expenditures for which you have signature authority on 7 budgets totaling over \$55,000. You also assist the Chair with budgeting and allocating monies within the department,

and you develop and maintain procedures for recording fiscal activity. You also assist the department Chair in determining and completing the academic year and preparing class schedules for each quarter; overseeing student employment, and providing support and coordination of faculty/adjunct searches.

The class series concept and basic function for the Administrative Assistant A, note, in part, that positions provide support to a head of a major organizational unit, including a "major academic or administrative department" in functional areas such as budget development and/or management, grant contract proposal preparation, space planning and analysis, expenditure control, student services, executive secretarial support, and curriculum planning. The distinguishing characteristics of the Administrative Assistant A similar to those describing your position include the decision making authority delegated to your position, such as budget monitoring, expenditure control, selection and oversight of student employees, and representation of the department.

While I did consider CWU's explanation of the organizational structure and assertion that the Chair of the Communications Department did not fit the role of a "senior academic official," I weighed that information with the totality of your duties and responsibilities. Your position's purpose is to facilitate the administration of the Communications Department, and you provide executive secretarial support to the Chair of that academic department as well as oversee the daily operations, which includes directing the work of student employees.

The student employees you oversee not only perform clerical tasks but also staff the front counter assisting students, staff, and faculty, and assist faculty members with special projects. As a result, the Office Support Supervisor is not the best classification because you do not exclusively supervise a clerical support unit. Although you do supervise the work of more than one student working varying shifts throughout a normal work day, this is one aspect of the office management responsibility assigned to your position. Further, your position's purpose is not to be a supervisor as envisioned by the following definition of supervisor:

An employee assigned responsibility by management to participate in all of the following functions with respect to their subordinate employees: (1) selection of staff, (2) training and development, (3) planning and assignment of work, (4) evaluating performance, (5) adjusting grievances, and (6) taking corrective action (Washington State Classification and Pay Administrative Guide).

With regard to the Administrative Services Manager Job classes, the scope of the duties and responsibilities assigned to your position do not reach the level of a manager because you assist the department Chair, who has management responsibility. While the functional aspect of some of your duties is similar to those of a Program Coordinator, the intent of the Program Coordinator position is to work within a specialized program.

As Ms. Zupan acknowledged, the duties and responsibilities assigned to your position extend beyond the Secretary Senior classification. While you do perform some executive secretarial duties to the Communications Department Chair, you also facilitate the administrative functions of the department. Therefore, based on the overall scope of the work you perform and the level of responsibility assigned to your position, the Administrative Assistant A classification is a better fit and best describes your position.

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: Karla Shugart, CWU
Lisa Skriletz, DOP

Enclosure: List of Exhibits