BEFORE THE PERSONNEL APPEALS BOARD

STATE OF WASHINGTON

JAMES COPHER, Appellant, v. OFFICE OF THE SECRETARY OF STATE, Respondent.	Case No. ALLO-01-0009 ORDER OF THE BOARD FOLLOWING HEARING ON EXCEPTIONS TO THE DETERMINATION OF THE DIRECTOR

Hearing on Exceptions. This appeal came on for hearing before the Personnel Appeals Board, WALTER T. HUBBARD, Chair; GERALD L. MORGEN, Vice Chair; and LEANA D. LAMB, Member, on Appellant's exceptions to the Director's determination dated March 7, 2001. The hearing was held in the Personnel Appeals Board hearing room in Olympia, Washington, on October 10, 2001.

Appearances. Appellant James Copher was present and was represented by Brenda Williams, Area Representative for the Washington Federation of State Employees. Respondent Office of Secretary of State (SEC) was represented by Toni Murray, Human Resource Manager.

Background. Appellant submitted a Classification Questionnaire (CQ) requesting that his Customer Service Specialist 2 (CSS2) position be reallocated to the Library Information Associate classification. Toni Murray, Human Resource Manager, reviewed the request and determined that Appellant's position should be reallocated to the Senior Library Information Assistant classification.

By letter dated October 31, 2000, Appellant appealed SEC's decision to the Department of Personnel (DOP). On February 22, 2001, the Director's designee, Paul Peterson, conducted an allocation review of Appellant's position. By letter dated March 7, 2001, Mr. Peterson determined

that Appellant's position should be allocated to the CSS2 classification. On April 6, 2001, Appellant filed exceptions to the Director's determination with the Personnel Appeals Board. Appellant stated that his position should be reallocated to the Library Information Associate (LIA) classification. Also on April 6, 2001, Respondent filed exceptions to the Director's determination with the Personnel Appeals Board. Respondent stated that Appellant's position should be reallocated to the Senior Library Information Assistant (SLIA) classification. Appellant's and Respondent's exceptions are the subject of this proceeding.

Appellant is the technical assistant for the Northwest Region of the State Archives and Records Management. He utilizes his specialized knowledge of archive reference services to identify and research archive materials, assist customers and researchers, and provide support services for the region archive program. Appellant reports to an Archivist and is primarily responsible for providing members of the public access to the public records held in the branch archives and to ensure the security of those records.

Summary of Appellant's Argument. Appellant argues that he spends a majority of his time performing research services for clients seeking government records. Appellant contends that government records is a specialty area and that providing research services is a technical specialty. Appellant asserts that he performs advanced, complex searches, answers reference questions, analyses and resolves research problems, responds to requests for information involving complex searches encompassing multiple sources outside of the region, and provides technical assistance to clients. Appellant argues that there is no classification that specifically addresses the duties and responsibilities of his position and that the agency has been reluctant to establish a classification to encompass his position. However, on a best-fit basis, Appellant contends that the scope and complexity of his duties and responsibilities fit the Library Information Associate classification.

Summary of Respondent's Argument. Respondent argues that library and archive services have a lot of parallels and that there is a historical basis between the two areas. For example, Respondent contends that both services manage, acquire, access and protect collections. Respondent contends that because of the similarities between library and archive functions, even though Appellant does not work in a library, his position should be allocated on a best-fit basis to a library classification. Respondent asserts that Appellant is the front-line person dealing with clients, helping clients to access collections, and assisting clients in anyway which is equivalent to the functions performed by the Senior Library Information Assistant classification. Respondent contends that the region Archivists function as specialists performing professional archiving duties while Appellant provides technical support duties. Respondent argues that Appellant's position best fits the Senior Library Information Assistant classification.

Primary Issue. Whether the Director's determination that Appellant's position is properly allocated to the Customer Service Specialist 2 classification should be affirmed.

Relevant Classifications. Customer Service Specialist 2, class code 09440; Library Information Associate, class code 25100; and Senior Library Information Assistant, class code 25060.

Decision of the Board. 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. Also, a position review is not a comparison of work performed by employees in similar positions. 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 which best describes the overall duties and responsibilities of the position. Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

In relevant part, the LIA classification encompasses positions that work under the administrative direction of a Library Information Specialist and serve as a consultant and recognized authority for a designated technical specialty. This designation must be identified in writing by the agency director and determined by documented mandates, goals, objectives and customer assessments. Incumbents in the LIA class know the history of their technical specialty subject area, pending considerations, developments and controversies in the subject area, and how to contact other renowned authorities on the subject. LIAs facilitate access to information, train, coach, and mentor others in the specialty area and perform the following tasks: responding to customer requests for information, tracking trends and emerging issues in the specialty area, and performing customer outreach and needs assessment. While government documents, information, statistics and demographics (current and historical) are considered a technical specialty area in the Washington State Library System, Appellant does not work within the State Library System and the director of the Secretary of State's office has not designated archives as a technical specialty area for purposes of allocation.

The SLIA classification encompasses positions that work in a library under the administrative direction of a professional librarian. In relevant part, positions at this level are assigned to a designated library service area in an operational unit and are responsible for coordinating operations that require a specific skill and substantive knowledge of library related processes, materials, and/or equipment. Incumbents utilize advanced journey-level knowledge of specific library principles and practices and broad-based knowledge of subjects related to the functional area. Appellant does not work in a library under the administrative direction of a professional librarian.

The CSS 2 classification is a generic class that encompasses positions that provide services to clients within a designated customer service program. Incumbents in this classification resolve complaints and problems, respond to inquiries, interpret agency-related laws, policies and

procedures, advise clients and customers of the proper procedures to access agency services, and perform incidental clerical support duties. Appellant provides services to customers accessing archives in the Northwest Region. The clerical duties he performs are incidental to providing assistance to customers, responding to questions from inside and outside entities, and resolving research problems. Appellant's duties and responsibilities are encompassed by the CSS 2 classification and his position is properly allocated.

Conclusion. The appeal on exceptions by Appellant should be denied. The appeal on exceptions by Respondent should be denied. The Director's determination dated March 7, 2001, should be affirmed and adopted.

ORDER

NOW, THEREFORE, IT IS HEREBY ORDERED that the appeals on exceptions by Appellant and by Respondent are denied and the Director's determination dated March 7, 2001, is affirmed and adopted. A copy is attached.

DATED this _____ day of _____, 2001.

WASHINGTON STATE PERSONNEL APPEALS BOARD

_____
Walter T. Hubbard, Chair

_____
Gerald L. Morgen, Vice Chair

_____
Leana D. Lamb, Member

Personnel Appeals Board
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