

BEFORE THE PERSONNEL RESOURCES BOARD
STATE OF WASHINGTON

WASHINGTON STATE PARKS AND
RECREATION COMMISSION,

Appellant,

vs.

CARMYN SHUTE,

Respondent.

CASE NO. R-ALLO-09-024

ORDER OF THE BOARD
FOLLOWING HEARING ON
EXCEPTIONS TO THE
DETERMINATION OF THE DIRECTOR

Hearing on Exceptions. This appeal came before the Personnel Resources Board, LAURA ANDERSON, Vice Chair, and DJ MARK, Member, for a hearing on Appellant's exceptions to the director's determination dated June 19, 2009. The hearing was held at the office of the Personnel Resources Board in Olympia, Washington, on January 21, 2010.

Appearances. Appellant Parks and Recreation Commission (Parks) was represented by Jose Vidales, Human Resource Consultant. Respondent Carmyn Shute was present and was represented by Kathy Andruss, Classification Director for the Washington Federation of State Employees.

Background. Ms. Shute's position was allocated to the Customer Service Specialist 2 (CSS2) class. Her position is located at the Fort Worden Conference Center. On April 25, 2008, Ms. Shute submitted a Position Review Request (PRR) to Park's Human Resources. Steve Shively, Ms. Shute's second-line supervisor, and Kate Burke, Fort Worden Area Parks Manager, signed the PRR as the supervisor and unit head, respectively. However, Susan Strizic-Thomas was Ms. Shute's first-line supervisor. Ms. Thomas did not sign the PRR.

The classification questionnaire (CQ) for Ms. Shute's position included a single entry describing 85% of her duties. To gain better understanding of the duties, by e-mail dated January 22, 2008, Mr. Vidales asked Ms. Thomas for a further breakdown of the duties. Ms. Thomas responded

1 with a revised CQ on March 5, 2008. Ms. Shute did not sign this CQ but she did review it and
2 provide clarification of the duties described.

3
4 By letter dated March 11, 2008, Mr. Vidales notified Ms. Shute that her position was properly
5 allocated as a Customer Service Specialist 2 and denied her request for reallocation to the
6 Customer Service Specialist 3.

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8 On April 7, 2008, Ms. Shute, submitted a Request for Director's Review form and noted that the
9 Conference Coordinator 3 class best described her position. By letter dated June 19, 2009, the
10 director's designee concluded that Ms. Shute's position was best described by the Conference
11 Coordinator 3 classification and that her position should be reallocated.

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13 On July 17, 2009, Parks filed exceptions to the director's determination. Parks' exceptions are the
14 subject of this proceeding.

15
16 Ms. Shute processes reservations for the Fort Worden Conference Center, coordinates a variety of
17 services for events held at the Conference Center such as weddings and family reunions, and
18 monitors, processes, prepares and reconciles invoices and payments. As described by Parks in their
19 March 11, 2008, letter, the majority of Ms. Shute's time is spent performing reservation duties,
20 coordinating events, processing payments and performing office duties. Her duties include
21 independently resolving client/customer service problems, providing information and assisting
22 clients/customers with event planning, and interpreting and applying laws and regulations regarding
23 facility use.

24
25 **Summary of Parks' Arguments.** Parks argues that Ms. Shute works in a customer service unit
26 where the majority of the work involves processing events for large groups and some conferences.
27 Parks asserts that this requires the customer service staff to following established processes and
28 procedures, communicate with program and reservations staff, and at times coordinate services and
29 act as a liaison within the agency. Parks contends that while Ms. Shute coordinates events, she does

1 not plan, arrange or coordinate conferences. Rather she provides information about the established
2 services available at Fort Worden such as food services. The conference leaders then contact
3 service providers to arrange for services themselves rather than Ms. Shute making the arrangements
4 for them. Parks further contends that Ms. Shute does not establish conference budgets, negotiate or
5 determine fees, select speakers, oversee details such as coffee service or off-site transportation, or
6 make off-site reservations. Rather, Parks alleges that Ms. Shute provides information to conference
7 leaders, processes, monitors, and tracks payments, represents the agency to outside entities, and
8 performs lead duties in the absence of her supervisor. Parks argues that Ms. Shute's duties and
9 responsibilities fit within the Customer Service Specialist 2 classification.

10
11 **Summary of Ms. Shute's Arguments.** Ms. Shute agrees that within the conference center, she
12 makes reservations for conferences and from time to time, for camping and recreational housing.
13 However, she argues that her work goes beyond making reservations. Ms. Shute argues that she
14 also explains the services available at Fort Worden and in the vicinity to conference leaders and
15 talks with conference leaders about overall budgets and the specific allotment funds to budget items
16 such as food budgets for various meals. She explains the level of service offered at Fort Worden
17 and how the conference center can help events to be successful. Ms. Shute asserts that she also talks
18 with conference leaders about details such as the amenities available at the various Fort Worden
19 sites and about rules and regulations within the park such as the use of a fire circle, having alcohol
20 on the premises, and observance of the parks' quiet hours. Ms. Shute contends that she plans,
21 coordinates, organizes, does billing, and provides information for large and small conference and
22 that the majority of her duties fit within the Conference Coordinator 3 classification.

23
24 **Primary Issue.** Whether the director's determination that Appellant's position should be
25 reallocated to the Conference Coordinator 3 classification should be affirmed.

26
27 **Relevant Classifications.** Customer Service Specialist 2, class code 102B, and Conference
28 Coordinator 3, class code 111C.

1 **Decision of the Board.** The purpose of a position review is to determine which classification
2 best describes the overall duties and responsibilities of a position. A position review is neither a
3 measurement of the volume of work performed, nor an evaluation of the expertise with which
4 that work is performed. A position review is a comparison of the duties and responsibilities of a
5 particular position to the available classification specifications. This review results in a
6 determination of the class that best describes the overall duties and responsibilities of the
7 position. See Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

8
9 Most positions within the civil service system occasionally perform duties that appear in more
10 than one classification. However, when determining the appropriate classification for a specific
11 position, the duties and responsibilities of that position must be considered in their entirety and
12 the position must be allocated to the classification that provides the best fit overall for the
13 majority of the position's duties and responsibilities. Dudley v. Dept. of Labor and Industries,
14 PRB Case No. R-ALLO-07-007 (2007).

15
16 When allocating positions, the following standards, in descending order, are the primary
17 considerations:

- 18 • Class series concept (if one exists).
- 19 • Definition or basic function of the class.
- 20 • Distinguishing characteristics of a class.
- 21 • Class series concept, definition/basic function, and distinguishing characteristics of other
22 classes in the series in question.

23 The class series concept for Customer Service Specialist series states:

24 Positions in this series provide assistance and problem resolution to agency
25 clients/customers and are located in a designated customer service program. The
26 intent of the series is to assist clients/customers in identifying agency processes
27 and procedures, resolving client/customer problems related to agency programs
28 and interpreting agency related laws, policies and procedures. Positions at all
29 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

1 series, includes tasks such as maintaining filing systems, maintaining logs,
2 updating computer or manual data systems, office and telephone reception,
3 completing office forms, compiling and completing recurrent reports, performing
4 routine typing, copy work and preparing mailings.

5 This occupational category is considered a technical occupational category.
6 Positions assigned to this occupational category have authority to accept, grant or
7 deny agency services or may mediate between the business of the agency and the
8 client (example: Attorney General's Consumer Protection Unit). Some positions
9 may train and provide leadership to volunteers.

10 Ms. Shute's duties are generally described in the Customer Service Specialist concept. However,
11 when there is a class that specifically includes a particular assignment and there is a general
12 classification that has a definition which could also apply to the position, the position should be
13 allocated to the class that specifically includes the position. Mikitik v. Dept's of Wildlife and
14 Personnel, PAB No. A88-021 (1989); see also, Waldher v. Dept. of Transportation, PRB Case
15 No. R-ALLO-08-026 (2009).

16 The class series concept for the Conference Coordinator series states:

17 Positions in this series plan, arrange, and coordinate facility and logistical support
18 for on- and off-site conferences, seminars, and workshops. Incumbents oversee
19 operational detail support services and may have financial responsibility
20 throughout the event including establishing budgets, selecting speakers, lodging,
21 catering, security, publicity, materials, and equipment; negotiating with vendors;
22 determining fees to charge participants; preparing and changing contracts; and
23 collecting and refunding conference fees. Coordination duties are usually complex
24 in nature such as overseeing and monitoring compliance with applicable laws,
25 regulations, policies, emergency procedures, and ADA compliance and making
26 arrangements for large-scale, multi-state regional conferences and simultaneous
27 unrelated conferences.

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

33 Incumbents typically establish conference and event budgets and negotiate rental
34 fees and associated costs for on- and off-site events and establish competitive
35 rates with the goal of recouping all costs, including overhead, negotiate revisions
36 to contracts, and make determinations regarding refunds.

1
2 The Conference Coordinator concept provides a better fit for Ms. Shute's duties and
3 responsibilities. She plans, arranges, and coordinates facility and logistical support for events at
4 Fort Worden Conference Center including operational support services such as:

- 5 • assuring ADA needs are addressed
- 6 • determining, collecting and refunding conference fees
- 7 • overseeing and monitoring compliance with applicable laws, regulations, policies for
8 activities such as fire circles and observance of "quiet time" after 11 p.m.
- 9 • making comprehensive arrangements for events and resolving logistical problems that
10 arise during events.

11 The definition for the Conference Coordinator 3 classification states:

12 Positions at this level work independently with limited supervision. Incumbents
13 plan, arrange, and coordinate a wide variety of support services for events such as,
14 complex single-day conferences, multi-day conferences, seminars, and workshops
15 requiring complicated planning and coordination of details. Incumbents represent
16 conference services to outside organizations and the community; plan and
17 coordinate all support services for conferences and conference-related functions,
18 seminars, and workshops; contact speakers, compile conference materials,
19 coordinate registration, make facility arrangements, negotiate services and costs,
20 develop conference budgets, and process billing. Incumbents independently
21 coordinate repeat programs and assist program leader with the development of
22 new programs.

23 We agree with the director's determination that the majority of Ms. Shute's work time is spent in
24 activities found at the Conference Coordinator 3 level. For example, she develops and supports
25 conferences and anticipates and deals with a large number of conference connected details. In
26 performing her duties, she:

- 27 • coordinates with conference leaders to organize accommodations and meeting spaces
- 28 • provides information to conference leaders for community vendors to meet specific needs
- 29 • assists the in developing conference and food service budgets
- directs group leaders in proper registration areas and methods
- meets with other Fort Worden staff to ensure that facility arrangements, food
service/catering and A/V needs are met as scheduled

- provides any other needed services to ensure a successful event.

In addition, she prepares and reconciles invoices and statements, monitors payments, arranges special payment schedules, adjusts fees, and offers discounts in response to clients' concerns.

In Allegri v. Washington State University, PAB Case No. ALLO-96-0026 (1998), the Personnel Appeals Board 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. In this case, Ms. Shute's level of independence and the scope and complexity of her duties, best fits within the Conference Coordinator 3 class.

In a hearing on exceptions, the Appellant has the burden of proof. WAC 357-52-110. Parks has failed to meet its burden of proof. Therefore, the appeal on exceptions should be denied, and the director's determination, dated June 19, 2009, should be affirmed.

ORDER

NOW, THEREFORE, IT IS HEREBY ORDERED that the appeal on exceptions by Parks is denied, and the director's determination dated June 19, 2009, is affirmed.

DATED this ____ day of _____, 2010.

WASHINGTON PERSONNEL RESOURCES BOARD

LAURA ANDERSON, Vice Chair

DJ MARK, Member