BEFORE THE PERSONNEL RESOURCES BOARD

STATE OF WASHINGTON

JOSEPH MEYERS, Appellant, vs. WESTERN WASHINGTON UNIVERSITY, Respondent	CASE NO. R-ALLO-17-030 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, NANCY HOLLAND YOUNG, Chair, VICKY BOWDISH, Vice-Chair, and SUSAN MILLER, Member, for a hearing on Appellant's exceptions to the Director's Determination dated October 12, 2017. The hearing was held on June 14, 2018, at Room 110, Capitol Court, 1110 Capitol Way, in Olympia, Washington.

Appearances. Appellant Joseph Myers was present and represented by Teresa Parsons of Washington Federation of State Employees (WFSE) and Thomas Ray, Labor Advocate was present as an observer to the proceedings. Respondent Western Washington University (WWU) was present and represented by Debbie Cwalina, Classification and Compensation Manager, WWU Human Resources HR.

Background. On June 21, 2017, WWU HR received a request to review Appellant's duties to ensure proper allocation from Appellant's supervisor, Brian "Hub" McCaulley. A report from WWU HR was issued on December 15, 2017, notifying Appellant that his position had been reallocated to Facilities Services Coordinator with an effective date of September 7, 2016.

On January 13, 2017, Office of Financial Management, State Human Resources (OFM-SHR) received a Request for Director Review.

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The Director's Review Specialist conducted a review of Appellant's position based on written documentation and by telephone conference. By letter dated October 12, 2017, the Director Review Specialist determined the most appropriate allocation for Appellant's position was the Facilities Services Coordinator (FSC) classification.

On November 9, 2017, Appellant filed timely exceptions to the Director's Determination.

As summarized by the Director's Designee, Appellant works for WWU and is located within the Facilities Management. Appellant's duties encompass planning, scheduling, coordination and monitoring resource management efforts of Facilities Management for projects and work requests. Appellant analyzes plans, specifications and requests in order to develop labor and material resource requirement reports. The primary purpose of Appellant's position is to establish priorities and develop daily work schedules for trade and maintenance shops to maximize the use of resources and to maintain and enhance integration of the Facilities Management information scheduling systems (FAMIS).

Summary of Appellant's Arguments. Appellant asserts that in order to be allocated to Maintenance Specialist (MS) 5 it is not a requirement that he have the highest level of responsibility as that responsibility lies with the Director of Facilities Management. Appellant further argues the level of responsibility and expertise needed to complete the assigned duties and tasks of the position exceeds that of the FSC classification. The Appellant is an expert tradesman, and he does not need to participate in the development of the department's budget in order to be allocated to the MS 5 classification. Appellant asserts that he assists in the coordination and direction of total physical plant construction and maintenance activities of a large institution, and that by this statement from the MS 5, Appellant does not need to be coordinating the direction of the total physical plant as the Director's Designee stated. Furthermore, Appellant does meet the allocation criteria within the MS 5 in that Appellant is an expert and that the OFM-SHR Glossary

of Classification Terms relates an expert back to the definition of a class. Appellant monitors all projects on the campus in order to schedule resources for any upcoming or continuing projects.

Appellant further argued the duties have not changed for several years, and it is odd that management now believes that Appellant's duties and his current position are not properly allocated. Appellant also believes the reallocation of the position has more to do with recent budget issues than it does with the duties being performed.

Summary of Respondent's Arguments. Respondent agrees with the Director's Designee that the duties of Appellant do not meet the MS 5 classification. Respondent argues that during staff meetings, the Appellant discusses the upcoming schedule with trades' supervisors, but that Appellant's supervisor, Hub McCaulley is the facilitator of the meetings and keeps the meetings on track. Respondent further argues the Appellant does not facilitate training, rather the duties he performs as it related to training is teaching new employees to use the work management system used to track Facilities Management projects. Appellant plans, coordinates and schedules resources to facilitate projects on campus.

WWU HR outlined that although there have been other MS 5s that have received downward allocations; this is an attempt by WWU HR to bring staff to OFM-SHRs current classification structure. WWU HR also understands the process can be somewhat impersonal, but it is their intent to ensure all employees at WWU are allocated correctly.

Primary Issue. Whether the Director's Determination should be affirmed and whether Appellant should remain allocated to the Facilities Services Coordinator classification.

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Relevant Classifications. Maintenance Specialist 5; Facilities Services Coordinator.

Definition of MS 5

> This is the supervisory or expert level of the series. Assists in the coordination and direction of total physical plant construction and maintenance activities of a large institution. Develop, implement, and monitor training. Implements and evaluates workflow priorities. Develops and disseminates instructions and information to unit personnel. Organizes, conducts and facilitates staff meetings.

Definition of Facilities Services Coordinator

> Plans, coordinates, estimates, and schedules maintenance and construction projects.

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. 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))

Allocating criteria consists of the class specification's class series concept (if one exists), the definition and the distinguishing characteristics. (See *Norton-Nader v. Western Washington University*, PRB Case No. R-ALLO-08-020 (2008)) typical work is not an allocating criterion, but may be used to better understand the definition or distinguishing characteristics. (See *Kristin Mansfield vs. Department of Fish and Wildlife,* PRB Case No. R-ALLO-11-014 (2011))

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

The Board carefully reviewed the documentation submitted during the Director's Review and considered the arguments presented by the parties at the hearing before the Board.

The Facilities Services Coordinator definition specifies incumbents of these positions "Plans, coordinates, estimates, and schedules maintenance and construction projects." The duties performed by the Appellant align with this statement. The Appellant plans WWU resources that includes tradesmen, analyzing plans, specification and requests to develop labor and material resource requirement reports. The Appellant establishes priorities and develops daily schedules for tradesmen that assist in maximizing the use of WWU resources. In addition, Appellant maintains and enhances integration of scheduling systems with Facilities Management information system.

Some of the duties performed by the Appellant are as follows:

- Analyze plans, specifications, and requests to develop labor and material resource requirement reports.
- Review projects and work in progress in order to adjust daily work schedules as necessary.
- Consult with clients in developing construction schedules that will provide the least disruption to their program to meet the needs of the university and effectively utilize Facilities Management resources.

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- Forecast resource workload and availability with SQL query extraction of data in construction management database software (Primavera) and/or facilities information management systems database software (FAMIS/AiM).
- Develop, provide, and maintain enterprise-wide project management, budget spend down, and resource leveling "what if" analysis for competing priority / risk scenarios.
- Perform Critical Path analysis of processes, methodologies, and practices through data mining of construction management software and facilities information management systems to optimize material resources efficiencies and effectiveness.

All of these duties meet the definition of the Facilities Service Coordinator.

When reviewing the MS 5 definition, the Board found that it is true that an incumbent does not need to meet the Glossary of Classification Terms definition of supervisor because the definition is two pronged. The MS 5 definition has two qualifiers, one an incumbent must be a supervisor; or two, an incumbent must be performing duties at the expert level. In addition, to performing at the expert level, an incumbent must also assist in the coordination and direction of the total physical plant construction and maintenance activities of a large institution, develop, implement and monitor training, implement and evaluate workflow priorities, develop and disseminate instruction and information to unit personnel, organize, conduct and facilitate staff meetings. Based on the definition and Appellant's assigned job duties, the Appellant does not meet the definition in its entirety. Furthermore, Appellant's argument that his duties have not changed in over 20-years, and therefore he should remain allocated to the MS 5 classification is not appropriate. The misallocation of a position over the course of an incumbent's employment is not reason to remain allocated to a particular classification.

In a hearing on exceptions, the Appellant has the burden of proof (WAC 357-52-110). Appellant has not met the burden of proof.

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ORDER

NOW, THEREFORE, IT IS HEREBY ORDERED that the appeal on exceptions by Joseph Myers is denied and Appellant's position remains allocated to Facilities Services Coordinator.

DATED this 28 day of AUGUST, 2018.

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NANCY HOLLAND YOUNG, Chair

Vicky Bowdish

VICKY BOWDISH, Vice-Chair

Susan L. Miller

SUSAN MILLER, Member

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