



STATE OF WASHINGTON

OFFICE OF FINANCIAL MANAGEMENT

STATE HUMAN RESOURCES DIVISION | DIRECTOR'S REVIEW PROGRAM

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May 23, 2016

TO: Kristie Wilson
Rules and Appeals Program Manager

FROM: Christa Biasi
Director's Review Specialist

SUBJECT: Nancy Coverdell v. Department of Social and Health Services (DSHS)
Allocation Review Request ALLO-16-003

Director's Determination

This position review is based on the work performed for the six-month period prior to April 27, 2015 (October 27, 2014 - April 27, 2015), the date that DSHS HR received Nancy Coverdell's request for a reallocation. For this review, it is important to note that there are two PDFs that have been submitted as part of the file. Exhibit A-6 was submitted to DSHS HR for the initial review on April 27, 2015, however, because of the IT Class Study currently being conducted by Office of Financial Management (OFM), Class and Compensation, employees currently working in an IT class were required to submit a PDF for the class study by July 31, 2015. Ms. Coverdell submitted her PDF for the class study on or about August 18, 2015 (Exhibits A-5 and B-3). During a phone interview on October 16, 2015, with Dorothy Hibbard, Classification and Compensation Specialist, the Parties agreed the most accurate description of her job duties for the subject time period of October 27, 2014 – April 27, 2015, are those duties reflected in the PDF received by Class and Compensation on August 18, 2015. Therefore, for the purpose of this review, I have used the PDF dated August 6, 2015 (Exhibits A-5 and B-3).

As the Director's Review Specialist, I carefully considered all the information in the file, including the exhibits and any written communication provided by the Parties. Based on my review and analysis of Ms. Coverdell's assigned job duties and the information obtained during the Director's Review Conference; I conclude her position is properly allocated to the Information Technology Specialist 3 (ITS 3) classification.

Background

On April 27, 2015, Ms. Coverdell submitted a Position Description Form (PDF) (Exhibit A-5 and Exhibit B-2) to DSHS HR requesting reallocation from an ITS 3 to an ITS 4.

On November 2, 2015 CJ Iwata, Classification and Compensation Specialist and Dorothy Hibbard, Classification and Compensation Specialist met with Ms. Coverdell to discuss her request for reallocation. During this discussion, the Parties agreed the PDF submitted for the IT Class Study, dated August 8, 2015 best described Ms. Coverdell's job duties.

By letter dated December 16, 2015, Ms. Hibbard, notified Ms. Coverdell that her position remained allocated to an ITS 3 (Exhibit B-1).

On January 22, 2016, OFM HR received Ms. Coverdell's request for a written Director's Review of DSHS's allocation determination (Exhibit A-1).

The Director's Review Conference was held on May 5, 2016 at the Capital Court Building, located at 1110 Capitol Way S, Olympia, WA 98501.

Rationale for Director's Determination

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. *Liddle-Stamper v. Washington State University*, PAB Case No. 3722-A2 (1994).

Organizational Structure

Children's Administration Technology Services Division (CATS) Project Management Organization (PMO) supports the entire CATS organization with full-scope project management and quality assurance, contract management assistance, release management, support for federal reporting and technical documentation including management of CATS SharePoint, as well as technical writing support.

According to the Organizational Chart (Exhibit B-2, p. 8), Ms. Coverdell works in the CATS Division of DSHS and reports to Anne Hunt, ITS 5, who in turn reports to Michael T. Smith, Director of CATS.

Position Purpose

As summarized in the PDF (Exhibits A-5 and B-3), Ms. Coverdell purpose is as follows:

As **Documentation Librarian/SharePoint Administrator/Site Owner** creates, manages and maintains the structure for team collaboration, document management, social features and how documents are kept, stored and the hierarchy (top level site, sub sites, folder structure, lists, libraries, items, etc.). Enforces adherence to documentation standards for all users of the documents within the IT organization...Acts as gatekeeper for managing access and

permissions, item security, and checking documents in and out to maintain strict control. Establishes access rules for the repository, as well as defining archiving and purging structure. Responsible for site provisioning of all sub-sites in the site collection. Responsible for administering, creating, customizing, and maintaining all lists, libraries, web parts, permissions, features, sites and sub-sites...

As Technical Writer creates: manages, maintains, and updates Online FamLink Help documentation necessary for the users of FamLink to determine how the FamLink System functions. Works directly, or in collaboration with peer and for subject matter experts in drafting, editing or assisting in the creation of the following technical materials (i.e. Word documents, Excel diagrams or flow charts, etc.) including, but not limited to, topic papers, Online Help files, Quick Help Guides, User Guides/Manuals, technical specifications, Interface schema, batch job processes, stored procedures, flow charts/diagrams; project plans and white papers. Checks content for adherence to set standards regarding clarity, conciseness, spelling, grammar, style and terminology; and helps to define and assist customers in following standards such as document outline, TOC, glossary, etc. versioning documents or other processes or protocols as defined by the IT organization. Understands complex technical concepts and translates them into user-friendly procedures by utilizing plain text to maximize reader comprehension. Obtains technical details from Developers, Testers, and Product Owners and documents those details in a way that is easily understood by End Users and support staff. Researches, analyzes and identifies areas for improvement in how the organization writes and uses its materials that are the basis for managing and maintaining the application and the organization (i.e. topic papers as blue prints to the system, protocols or guidelines on how staff time is managed, etc.). Uses various application/software such as: Word, Excel, Access, Project, Visio, Adobe Captivate, RoboHelp, etc., to support the media applications.

As **FamLink Contract Management Assistant** drafts, creates, monitors, and updates Memorandum of Understanding, Inter Agency Agreements, Inter Local Agreements and Data Sharing Agreements utilizing Agency Contracts Database (ACD).

Duties and Responsibilities (Exhibits A-5 and B-3)

45%¹ **Document Librarian**

- Manages the IT repository for IT staff and other identified stakeholder including but not limited to:
 - Controlling who has access/permissions
 - Setting access levels such as read-only, contributor, design, and /or full control material
 - Acts as gatekeeper for managing access and permission, item security, and checking documents in and out to maintain strict controls
 - Monitors who has repository items checked out

¹ Although Exhibits A-5 and B-3 indicate Ms. Coverdell's Document Librarian duties are 40% of her total duties, during a telephone conversation, Ms. Coverdell agreed that her Document Librarian (SharePoint) duties encompass 45% of her total work duties. By adding 5%, this also brought her total percentage of duties to equal 100% which is a requirement of all PDFs.

- Responsible for site provisioning of all sub-sites in the site collection
- Responsible for administering, creating, customizing, and maintaining all lists, libraries, web parts, permissions, features, sites and sub-sites
- Drafts, trains and enforces documentation standards
- Enforces adherence to documentation standards for all users of the documents within the IT organization
- Defines the repository structure and hierarchy (top level site, sub-sites, folder structure, lists, libraries, etc., that supports a logical navigation to materials)
 - Defines and enforces archiving and purging aspects of the repository
 - Monitors and researches system performance and plans for future scalability and growth (i.e. adapting to newer versions, upgrades, system response when there is high volume of use)
- Serves as point of contact for CA staff:
 - Troubleshoots and responds to staff issues via Track It, email, or by phone
 - Provides basic training on the use of SharePoint features and creates cheat sheets for staff as needed or as requested
 - Coordinates and assists headquarters or field staff on creating and managing sub-sites
 - Monitors, modifies and updates access/permission regularly

35% **Technical Writer**

- Works directly, or in collaboration with peers and/or subject matter experts in drafting, editing or assisting in the creation of the following technical materials (i.e. Word documents, Excel diagrams or flow charts, etc.) including, but not limited to, topic papers, OnLine Help files, Quick Help Guides/Manuals, release notes, technical specifications, interface schema, batch job processes, stored procedures, flow chart/diagrams, project plans and white papers.
 - Follows and support standards for materials and content for technical writing such as grammar, spelling, etc.
 - Checks content for adherence to set standards regarding clarity, conciseness, spelling, grammar, style and terminology; and any helps to define and assist customers in following standards such as document outline, TOC, glossary etc. versioning documents or other processes or protocols as defined by the IT organization.
- Daily use of application software such as: Word, Excel, Access, Project, Visio, Adobe Captivate, RoboHelp, etc., or other as used by the IT organization
- Drafts issue papers for areas of improvement in hose the organization write and utilizes materials

15% **FamLink Contract Management**

Creates, monitors, and updates the following FamLink contracts:

- Memorandums of Understanding
- Inter-Agency Agreements
- Inter-Local Agreements
- Data Sharing Agreements

5% **Other duties as required**

Summary of Ms. Coverdell's Perspective | October 16, 2015 and November 2, 2015 Interviews with Dorothy Hibbard, DSHS HR (Exhibit B-1)

October 16, 2015 Interview

During an interview with Ms. Coverdell and Ms. Hunt, Ms. Hunt indicated that she initially "did not envision this [Ms. Coverdell's] position doing so much FamLink ... and that she moved work to this position gradually in order to keep it current." Some of this work includes updating and making sure the data sharing agreement and other agreements are renewed annually and kept current.

Ms. Coverdell discussed several of her duties during the interview:

Technical Writing:

- Review a variety of technical documents and translate the technical language into terminology understandable by lay people.
- Help write the language that "pop ups" on the "Help" applications, including translating the technical language into an understandable language. If assistance is needed in the interpreting the technical language, Ms. Coverdell would go to functional staff.
- Use of RoboHelp which is a mobile friendly technology that assists in creating online videos for the "Help" application.

SharePoint Administrator for Children's Administration Technology Services (CATS), which includes assisting approximately 3,000 staff in using the technology:

- Manage problems that come through on "Track It."
- Responsible for setting up sites for sharing documents; troubleshooting; building new libraries; setting permissions; monitoring where documents are and unlocking them as needed; drafting standards for libraries; and determining when things should be done.
- "Help Desk" contact for SharePoint which includes referring server and software issues to the technical staff and handling user level issue (i.e. assisting in finding documents previously stored; setting up a library; and assigning security permissions.

Although Ms. Coverdell is recognized as the SharePoint Administrator, Enterprise Technology Division (ETD) controls the technical support of the SharePoint site. When ETD recently moved to a newer version of SharePoint, it caused issues; this subsequently caused Ms. Coverdell to do a significant amount of troubleshooting and increased her workload as it related to SharePoint.

November 2, 2015 meeting between Ms. Coverdell, Dorothy Hibbard and C.J. Iwata

During this meeting the parties discussed the increase in Ms. Coverdell's duties. The increase in duties are a result of Ms. Coverdell being assigned the site owner of SharePoint for all of Children's Administration versus only for CATS. Ms. Hibbard, DSHS HR outlined Ms. Coverdell's duties after their meeting as follows:

"... [A]s SharePoint librarian you create subsites and calendars. You create sites and `calendars for others and give them over to others to manage. You deal with daily issues such as people not being able to access sites, permission issues, setting up groups, editing permissions, and setting up remote access. You also maintain the system, you determine who is able to access certain areas of SharePoint and what type of access they may have (view only, contributor; etc.). You do a lot of customer service/support. You stated that you have a troubleshooting partner for technical issues.

"In your role as a technical writer, you translate technical verbiage into lay terms. You provide the "help" verbiage on the help links on FAMLINK - the user guides, quick help guides. You use the tool "RoboHelp" to assist you in putting in hyperlinks, doing videos and such. You created training materials for tablet and iPhone training. You develop the script and are the presenter of the material on camera."

Ms. Coverdell also stated that some of her duties and time can also include the following:

- Prepare the data sharing agreements for review by your supervisor and the CATS Director.
- Approximately half time is spent on SharePoint and the other half on datasharing and technical writing.
- Some programming when using RoboHelp.
- Utilize Captivate to assist you in making the changes to the Help tabs.
- Work with a functional team that makes release changes in order to get the new information out to users.
- Handle release notes.
- Translate and develop plain talk messages to go out.

Request for a Director's Review (Exhibit A-1)

In Ms. Coverdell's Request for a Director's Review, she further clarifies her duties are they relate to SharePoint:

[M]anages and oversees SharePoint site functions and capabilities; provides site administration and technical support serving as DSHS Children's Administration and DSHS Children's Administration Technology Services' technical lead to roughly 2,500 staff; responds and resolves to all Help300 Track-It service tickets and/or requests, e-mails, and phone calls for SharePoint user problems; meets with divisional staff to assisting creating new sites and/or subsites based on customer needs, requests, and project requirements; develops and sets permissions/security and resolves and troubleshoots permissions/security issues; as documentation librarian requires check-out on all document libraries, adds check-out by column, trains users how to check-out, check-in, and discard check-outs, creates permission levels, decides whether to use versioning, sets retention limits if versioning is used, configures views that will help users navigate libraries effectively, creates content types for documents that belong in libraries, pushes navigation aids to users, and Integrates custom columns; coordinates with the

DSHS SharePoint Farm Administrator (ITS 6) when issues are of a severe nature or are more involved than Children's Administration troubleshoot and resolve SharePoint issues; develops, conducts training, and create cheat sheets as requested or required for SharePoint users and customers.

Although Ms. Coverdell's main duties do surround the administration of SharePoint, in her request for review, she also discusses her technical writing. The technical writing and dissemination of help materials and training videos, takes up a significant amount of her time (approximately 35% as stated in August 6, 2015 PDF) as does her work on data-share agreements and her duties as Back-Up Release Manager.

Summary of DSHS's Perspective | Determination Letter (Exhibit B-1)

In summarizing the duties of Ms. Coverdell, Ms. Hibbard made comparisons to the ITS classification in order to determine an appropriate job class. Ms. Hibbard states:

"In order to determine the correct allocation for your position, I reviewed the specifications for Information Technology Specialist 3 and Information Technology Specialist 4 as well as the Class Series Concept as seen on the Information Technology Specialist specification."

Typical Work

Ms. Hibbard states in the determination letter that Ms. Coverdell's duties, "...supporting CA and CATS staff in their usage of the Administration's SharePoint site ... appear[s] [the] position does perform applications support for the software product of SharePoint."

Ms. Hibbard further describes DSHS HR's position on denying the reclassification of Ms. Coverdell from ITS 3 to an ITS 4 by outlining the two specifications and comparing these to Ms. Coverdell's job duties. Each of her comparisons to the specifications are as follows:

Comparison to ITS 4

"With your duties supporting CA and CATS staff in their usage of the Administration's SharePoint site, it appears your position does perform applications support for the software product of SharePoint. The next step is to determine the appropriate level within the series."

Forty-five percent of your duties are encompassed in your role as "Document Librarian" for the CA SharePoint site. ...[A]s the gatekeeper and librarian for the SharePoint site for CA and CATS. You resolve permission issues and assist staff in building sites, lists and libraries within SharePoint. You monitor the system for performance and for items checked out. You are the main point of contact within CA for SharePoint usage and issues. You also provide training on the basics of using SharePoint. You refer any technical issues to a technical staff person within CATS. To reach the level of ITS 4, incumbents must serve as a senior level specialist and/or serve as a team or project leader a majority of the time. Incumbents apply advanced technical knowledge and considerable discretion to evaluate and resolve complex tasks as the primary focus of their position. Your

position does not reach this level of responsibility. You do not perform your functions as a senior-level specialist that requires applying advanced technical knowledge and considerable discretion to evaluate problems and perform complex tasks as the major focus of your position.

For example, incumbents at this level perform complex tasks such as evaluating and resolving complex planning efforts, directing large-scale projects conducting capacity planning, designing multiple-server systems; directing or facilitating the installation of complex systems hardware, software, application interfaces, or applications.

In your secondary role of Technical Writer (35% of your duties), you interpret technical terminology into Plain Talk verbiage to be disseminated out to a specific audience. The documents you work with include; topic papers, OnLine Help files, Quick Help Guides, User Guides/Manuals, release notes, technical specifications, interface schema, batch job processes stored procedures, flow chart/diagrams, project plans and white papers. In this role, you use a variety of software applications such as Word, Excel, Access, Project, Visio, Adobe, Captivate, RoboHelp, etc. to assist you in formatting and displaying the information you are working with.

Comparison to ITS 3 Class

In comparing your duties to this definition, I find more similarities with the scope and level of responsibilities. You support the users of the SharePoint site, independently consulting with them and troubleshooting issues they are having with the application. You use established procedures and innovative approaches to support and maintain the SharePoint site. Most of your assignments are of moderate size and affect mainly the one administration. You consult with higher-level technical staff members to resolve the more complex problems and issues that come to you.

Summary of Director's Review Conference May 5, 2016 | Ms. Coverdell

During the review conference Ms. Coverdell discussed how her duties evolved almost immediately upon her taking her current position. She discussed that she was initially hired as the SharePoint documentation librarian and also the technical writer for FamLink. As such, her original main duty was to clean up and organize the agency's SharePoint site, including setting permissions and assisting people with permissions, etc. As technical writer she updates the case manager family so that when there are releases and updates to the health query, she uses RoboHelp to get assistance with the new release, etc. Originally these duties only supported about 750 staff members, however, she is now the site administrator, and these duties now support approximately 2500 staff within CA.

Ms. Coverdell discussed her view of duties and how these duties met the ITS 4 classification. During this time, Ms. Coverdell relayed that her SharePoint duties have expanded and there are more issues with the program. She stated, "When I come in there are lots of tickets, I can spend a whole day working through an issue, there is a lot of troubleshooting, a lot of time spent trying

to determine how to resolve an issue. There are a lot of phone calls and emails back and forth... Although we have twenty-four (24) hours to resolve an issue, it is important that it is resolved quickly so that we do not have a work stoppage and that they [the customers] are able to do their work.”

Ms. Coverdell believes the work she performs is at a higher level. She determined this by looking at careers.wa.gov, she stated she has never seen a SharePoint Administrator that is an ITS 3 and that they [SharePoint Administrators] are usually ITS 4s and 5s. She also accounts the higher level of her work with data-sharing agreements or SharePoint Administrators. Ms. Coverdell indicated the Help is evolving as well her duties as they pertain to the Learning Management System (LMS). However, Ms. Coverdell indicated that she does not work on the “back end” of the LMS system where the programming is completed.

Ms. Coverdell also noted that within DSHS you can have an ITS 4 assigned to a printer or an ITS 4 greeting customers and there is very little continuity of duties within DSHS when it comes to the ITS class. She feels those who are willing to do the work, learn and better themselves are often overlooked.²

Summary of Closing Statement | Ms. Coverdell

Ms. Coverdell, in her closing statement, indicated that she is confused by the comparison to the Communications Consultant class and how that particular class can be compared to the IT class. Ms. Coverdell did not approach her supervisor (Anne Hunt) or her Director (Michael Smith) to be reallocated, they approached her. Ms. Coverdell reiterated that they both believe she is an ITS 4. She also stated that from day one, when the parties first met she has been hearing about the Communications Consultant, which is a downgrade from her current position. She feels that unless you have an IT background, it would be difficult to determine the specific job duties of an IT position.

Ms. Coverdell further directed the parties to look at her Exhibit 15 which is a letter from her Director supporting her reallocation to an ITS 4.

Summary of Director's Review May 5, 2016 | DSHS

During the Director's Review Conference, Ms. Hibbard asked for clarification of Ms. Coverdell's duties as it relates to her work with SharePoint administration. Initially Ms. Coverdell was the administrator of SharePoint only for CATS, however, after she began in her current position her administrator duties encompassed all of CA, which is approximately 2,500 employees compared to about 18,000. These duties are localized to one division, not the agency as a whole.

Ms. Hibbard further explained that SharePoint is used within the agency, each division has their own administration of SharePoint or whatever portions of it, however Information System Services Division (ISSD) has overall control and only limited functions are given to the division administrators. Ms. Hibbard further described ISSD as the central information services division for DSHS and is also over the entire agency as it relates information technology.

² Although Ms. Coverdell mentions that other employees in the ITS class within DSHS have varying functions and are classified at higher and lower levels than she, as the Director's Review Specialist I can only look at the duties assigned to an individual [Ms. Coverdell]. The allocation or misallocation of a similar position is not a determining factor in the appropriate allocation of a position. *Flahaut v. Dept's of Personnel and Labor and Industries*, PAB No. ALLO 96-0009 (1996).

Ms. Iwata indicated that during the course of HR's review it was also contemplated that the Communication Consultant class for Ms. Coverdell may also fit her duties. Ms. Iwata's reasoning behind this is due to the work that Ms. Coverdell performs as it relates to the creation, including the script and dissemination of the help materials that are also part of the Learning Management System (LMS).

Summary of Closing Statement | DSHS

During closing statement, Ms. Iwata indicated that based on her opinion of the work that is performed day in and day out, it feels to her that it would fit better in the Communications Consultant series because the position translates verbiage into lay terms, puts things into plain talk so everyone can understand. The information is then disseminated on to the public website for individual use as well as the DSHS employees. This position has a large component to it that feels like a Communications Consultant that happens to be a SharePoint Super User and who uses the tools of Captivate and RoboHelp to convey new information, changes and updates. Even more so, this position does not test, program or develop, install or do the pure technical IT work and as such the work aligns more with the Communications Consultant Series. Although Ms. Iwata makes the argument that based on the technical writing and dissemination of such writing duties performed by Ms. Coverdell, she can be classified in the Communication Consultant Series. I find her duties are best described within the ITS Class Concept.³

Ms. Hibbard added, that if the position was to be left in the IT series, the position is more in line with the level of work performed at the ITS 3 level because Ms. Coverdell uses the systems, uses established work procedures and consults with higher level technical staff when complex issues need to be resolved. Therefore, she does not see the senior level ITS 4 specialist in Ms. Coverdell's position.

Comparison of Duties to Class Specifications

I carefully reviewed the exhibits submitted by the Parties. Allocating criteria consists of the class specification's class series concept (if one exists), the definition and the distinguishing characteristics. Typical work is not an allocating criterion, but may be used to better understand the definition or distinguishing characteristics.⁴

The first consideration when allocating a position is ensuring it fits the class series concept. For this purpose I reviewed the concepts for the ITS class.

³ Most positions with the civil service system occasionally perform duties that appear in more than one classification. When determining the appropriate classification for a specific position, the duties and responsibilities of that position must be considered in their entirety... the position must be allocated to the classification that provides the best fit overall for the majority of the position. *Dudley v. Dept. of Labor and Industries*, PRB Case No. R-ALLO-07-007 (2007).

⁴ In *Norton-Nader v. Western Washington University*, PRB Case No. R-ALLO-08-020 (2008), the Personnel Resources Board (Board) stated that the following standards are the hierarchy of primary considerations in allocating positions: a) Category concept (if one exists); b) Definition or basic function of the class; c) Distinguishing characteristics of a class; and d) Class series concept, definition/basic function, and distinguishing characteristics of other classes in the series in question.

ITS Class Concept (Relevant Parts Only)

Positions in this category perform professional information technology systems and/or applications support for client applications, databases, computer hardware and software products, network infrastructure equipment, or telecommunications software or hardware.

This category broadly describes positions in one or more information technology disciplines such as: Application Development And Maintenance, Application Testing, Capacity Planning, Business Analysis and/or Process Re-Engineering, Data Base Design And Maintenance, Data Communications, Disaster Recovery/Data Security, Distributed Systems/LAN/WAN/PC, Hardware Management And Support, Network Operations, Production Control, Quality Assurance, IT Project Management, Systems Software, Web Development, or Voice Communications.

Ms. Coverdell's position performs information technology duties that support an entire division within DSHS (Children's Administration). She provides technical support for client applications such as SharePoint and manages the IT repository for all IT staff and other stakeholders, and therefore, should be allocated to a class within the IT series.

ITS 4 Definition (Relevant Parts Only)

Performs analysis, system design, acquisition, installation, maintenance, programming, project management, quality assurance, troubleshooting, problem resolution, and/or consulting tasks for complex computing system, application, data access/retrieval, multi-functional databases or database management systems, telecommunication, project or operational problems.

As a senior-level specialist in an assigned area of responsibility and/or as a team or project leader, applies advanced technical knowledge and considerable discretion to evaluate and resolve complex tasks such as planning and directing large-scale projects; conducting capacity planning; designing multiple-server systems; directing or facilitating the installation of complex systems, hardware, software, application interfaces, or applications; developing and implementing quality assurance testing and performance monitoring; planning, administering, and coordinating organization-wide information technology training; acting as a liaison on the development of applications; representing institution-wide computing and/or telecommunication standards and philosophy at meetings; or developing security policies and standards.

Incumbents understand the customer's business from the perspective of a senior business person and are conversant in the customer's business language. Projects assigned to this level impact geographical groupings of offices/facilities, and/or regional, divisional, or multiple business units with multiple functions. The majority of tasks performed have wide-area impact, integrate new technology, and/or affect how the mission is accomplished.

Positions in this category perform professional information technology systems and/or applications support for client applications, databases, computer hardware and software products, network infrastructure equipment, or telecommunications software or hardware.

Some of Ms. Coverdell duties may be performed at the ITS 4 level of this class, however those duties are minimal and do not meet the overall scope of duties and definition of the class. For example, while Ms. Coverdell does assess and develop training materials as they relate to FamLink, she does not *conduct advanced instruction* on the use of information technologies. Rather she obtains technical details from Developers, Testers, and Product Owners and documents those details in a way that is easily understood by End Users and support staff. More so to the point, these duties are done within a specific division of DSHS and do not reach agency-wide in scope.

As ITS 4s, incumbents are tasked with senior-level specialist duties and work independently to apply advanced technical knowledge using considerable discretion to evaluate and resolve issues. Although Ms. Coverdell is the "Help" contact for SharePoint, she refers server and software issues to technical staff who in turn, resolve the complex issues.

Furthermore, as the SharePoint Administrator, Ms. Coverdell does manage and maintain the structure, enforces adherence to documentation standards, maintains strict control for checking documents in and out of the system and performs a myriad of other administrator duties as the administrator within CA, she does not perform these functions agency-wide nor does she manage the quality assurance testing and performance monitoring of the system itself. These functions are handled by the ISSD, where the "back-end" functions are maintained for usability of the system.

ITS 3 Definition (Relevant Parts Only)

In support of information systems and users in an assigned area of responsibility, independently performs consulting, designing, programming, installation, maintenance, quality assurance, troubleshooting and/or technical support for applications, hardware and software products, databases, database management systems, support products, network infrastructure equipment, or telecommunications infrastructure, software or hardware.

Uses established work procedures and innovative approaches to complete assignments and coordinate projects such as conducting needs assessments; leading projects; creating installation plans; analyzing and correcting network malfunctions; serving as system administrator; monitoring or enhancing operating environments; or supporting, maintaining and enhancing existing applications.

The majority of assignments and projects are moderate in size and impact an agency division or large workgroup or single business function; or internal or satellite operations, multiple users, or more than one group. Consults with higher-level technical staff to resolve complex problems.

ITS 3 level positions work independently and perform functions within an assigned area of responsibility. They identify and resolve problems within a scope of operation such as a division, or large workgroup or single business function, multiple users or more than one group. The work

methods used and the level of independent decision making required often combines following pre-defined standards as well as developing innovative approaches to resolve problems or issues that arise. While fully capable of working independently, complex problems are resolved through consulting with higher-level technical staff.

In this case, Ms. Coverdell is the SharePoint administrator for CA, a division within DSHS. As the SharePoint administrator, Ms. Coverdell supports the users of the SharePoint site, independently consulting with customers and troubleshooting issues they are having with the application. Additionally, she uses established procedures and innovative approaches to support and maintain the SharePoint site within her designated division. Most of her assignments are of moderate size and affect mainly the one administration. Lastly, Ms. Coverdell consults with higher-level technical staff members to resolve the more complex problems and issues.

Although the Typical Work examples do not form the basis for an allocation, they lend support to the work envisioned within a classification. The following provides an example of the level of work assigned to the ITS 3 class, as stated on the class specification:

- Follows structured processes to determine requirements...;
- Conducts needs assessments, requirements analysis and evaluates products for applications, computing...;
- Serves as system administrator. Identifies moderate operational problems that impact one division or large work group or single business function. Interacts with vendors to resolve straightforward problems. Works with vendors to identify and implement code changes; monitor service level agreements;
- Uses advanced hardware and software diagnostic tools such as network analyzing equipment and operating system diagnostics to identify and either resolve or refer problems to other staff for analysis;
- Assesses training needs, determines training approaches and develops course materials. Instructs users and computer support staff... and;
- Provides maintenance and operations support for applications.

Ms. Coverdell's responsibilities as the SharePoint administrator include creating, managing and maintaining the structure for team collaboration, document management, social features and how documents are stored and the hierarchy (top level site, sub sites, folder structure, lists, libraries, items, etc.). She also manages and oversees SharePoint functions and capabilities by providing site administration and technical support by serving as CA's technical lead to approximately 2,500 staff (Exhibit A-5).

In addition, Ms. Coverdell also responds to all Help300 Track-It services tickets and requests through emails and phone calls for SharePoint user issues. Ms. Coverdell can spend all day working on issues and often times she needs to develop a "work around" in order to prevent any work stoppage within the division. These "work arounds" are generally done in concert with ISSD or even ITS 4 or 5s.

Ms. Coverdell also meets with divisional staff to assist in creating new sites and/or subsites based on customer needs or project requirements; she develops and sets permissions/security and resolves and troubleshoots permissions and security issues; etc. She also researches and analyzes the need for modifications to the process or repository capacity for current and future needs or growth and submits an issue paper with recommendations as to what changes need to be made.

While the aforementioned duties are a significant part of Ms. Coverdell's duties, she also is involved in technical writing for Online Famlink. While performing these duties, she works directly, or in collaboration with peers and/or subject matter experts in drafting, editing or assisting in the creation of technical materials (i.e. Word documents, Excel diagrams or flow charts, etc.) including, but not limited to, topic papers, Online Help files, Quick Help Guides, User Guides/Manuals, technical specifications, interface schema, batch job processes, stored procedures, flow chart/diagrams, project plans and white papers.

After careful review of the information contained in the file and the information obtained during the Director's Review Conference, I have determined the primary function of Ms. Coverdell's position and the majority of her duties in their entirety, fall within the scope and level of responsibility in the stated Definition for the ITS 3 class. Therefore, her overall level and scope of assigned duties and responsibilities are aligned with the ITS 3 class which are consistent with ITS 3 level work and therefore the best fit.⁵

Appeal Rights

RCW 41.06.170 governs the right to appeal. RCW 41.06.170(4) provides, in relevant part, the following:

An employee incumbent in a position at the time of its allocation or reallocation or the agency utilizing the position, may appeal the allocation or reallocation to the Washington Personnel Resources Board. Notice of such appeal must be filed in writing within thirty days of the action from which appeal is taken.

The mailing address for the Personnel Resources Board (PRB) is PO Box 40911, Olympia, Washington, 98504-0911. The PRB Office is located on the 3rd floor of the Raad Building, 128 10th Avenue SW, Olympia, Washington. The main telephone number is (360) 407-4101 and the fax number is (360) 586-4694.

If no further action is taken, the Director's determination becomes final.

c: Nancy Coverdell, Appellant
Dorothy Hibbard, SPHR, Classification & Compensation Specialist
C.J. Iwata, Classification & Compensation Specialist

Enclosure: List of Exhibits

⁵ The best fit concept is supported by *Salsberry v. Washington State Parks and Recreation Commission*, PRB Case No. R-ALLO-06-013 (2007), the Personnel Resources Board (the Board) addressed the concept of best fit. The Board referenced *Allegri v. Washington State University*, PAB Case No. ALLO-96-0026 (1998), in which 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 [her] position.

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LIST OF EXHIBITS

A. Nancy Coverdell Exhibits

1. Request for Director's Review dated January 11, 2016
2. Letter of Denial of Reallocation Request December 16, 2015
3. Position Description Form for New Permanent IT Specialist 3 April 30, 2014
4. Information Technology Specialist 3 Job Bulletin
5. Position Description Form August 6, 2015
6. Position Description Form, April 21, 2015 for Reallocation
7. Assessment of Observed Job Performance
8. Performance Evaluation July 1, 2014 to January 1, 2015
9. Desk Manual for Information Technology Specialist 3
10. SharePoint Administrator Work Examples
11. Deployment of Code Work Examples
12. Process for Updating On-Line Help Work Examples
13. Topic Papers
14. E-mails from Supervisor Anne Hunt
15. E-mail from Division Director, Michael Smith
16. E-mails to DSHS/HRD Checking Status of Reallocation Request

B. DSHS Exhibits

1. Allocation Determination Letter dated 12/16/15
2. Reallocation Request Package received 4/27/15 (includes position description, org. chart, employment history form and Assessment of Job Performance)
3. Position Description for position XZ21 submitted for IT Study, received 8/18/15
4. Previous position description for XZ21 received 4/29/14
5. Dorothy Hibbard's notes from phone conversation with Nancy Coverdell and supervisor, Anne Hunt
6. Dorothy Hibbard's notes from 11/2/15 meeting with Nancy Coverdell
7. C.J. Iwata's notes from 11/2/15 meeting with Nancy Coverdell
8. ITS 3 class specification
9. ITS 4 class specification
10. IT Job Families Overview document
11. Definitions of SharePoint activities from internet

C. Class Specifications

1. IT Specialist 3
2. IT Specialist 4