

April 14, 2008

TO: Crystal Wang

FROM: Teresa Parsons
Director's Review Program Supervisor

SUBJECT: Crystal Wang v. Central Washington University (CWU)
Director's Review Request ALLO-07-014

On January 10, 2008, I conducted a Director's review meeting by telephone conference call regarding the allocation of your position. Present during the conference call were you, Stephen Sarchet and Traci Klein from the Human Resources Office at CWU, and Jamie Schaderman, a Systems Analyst with Application Services.

Background

On November 9, 2006, you submitted a Position Review Request (PRR) to CWU's Human Resources Office, requesting that your Information Technology Specialist 3 (ITS 3) position be reallocated to an Information Technology Specialist 4 (ITS 4). By memorandum dated February 23, 2007, Traci Klein from CWU's Human Resources Office notified Carmen Rahm, Assistant Vice President for Information Technology Services, that the ITS 3 classification best described your position. In her determination, Ms. Klein concluded that your position develops, implements, and maintains the application system and associated interfaces within PeopleSoft, which she believed met the distinguishing characteristics of an ITS 3 position. Ms. Klein did not believe your assigned duties impacted multiple business units with multiple functions or had university-wide impact; therefore, she concluded your position did not meet the threshold of the ITS 4 classification.

On March 8, 2007, the Department of Personnel received your request for a Director's review of CWU's determination.

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

Summary of Ms. Wang's Perspective

You assert your position serves as a senior-level specialist and project lead. As such, you contend you apply advanced technical knowledge and use discretion in evaluating and resolving complex tasks such as planning and directing large-scale projects. You further state that you act as a liaison with regard to the development of applications. You assert your position has the responsibility of integrating new technology and performing tasks with wide area impact that affects multiple business areas with multiple functionalities. You assert the scope and level of responsibility assigned to your position fits the ITS 4 classification.

Summary of CWU's Reasoning

CWU asserts the majority of your work is spent maintaining major application systems and associated interfaces, organizing cross-team responses to problems, and developing and updating user documentation. While CWU acknowledges your assignments require technical and specialized knowledge, the university contends the technical aspects are limited to specific modules within an application. As an example, CWU states that you took the lead on a particular piece of a project to get the Application Messaging/Integration Broker (IB) turned on within the Student Refunds section of PeopleSoft. However, CWU describes the IB as a tool that facilitates communication between the modules in PeopleSoft. CWU states that ITS 4 level positions have responsibility for an entire module, while ITS 3 positions perform support duties for all of the modules. CWU contends your involvement with projects such as the IB is limited in scope part of a larger upgrade project. CWU does not view your duties as impacting multiple business units with multiple functions or having wide area impact affecting the university's mission. Instead, CWU contends your level of responsibility is consistent with the scope and intent of the ITS 3 classification.

Director's Determination

This position review was based on the work performed for the six-month period prior to November 9, 2006.

As the Director's designee, I carefully considered all of the documentation in the file, the exhibits presented during the Director's review meeting, and the verbal comments provided by both parties. Based on my review and analysis of your assigned duties and responsibilities, I conclude your position is properly allocated to the Information Technology Specialist 3 classification.

Rationale for Determination

Your position is assigned to the Application Group within Information Technology Services. The position description form you provided with your request, though unsigned, summarizes your position as follows (Exhibit B):

Under the general direction of the ITS Director for Applications, the incumbent independently applies analysis, design, technical programming, data access/retrieval, database management, and problem solving skills to applications, projects, databases, or database management systems in an assigned area of responsibility.

Similarly, you described your position's purpose on the PRR, in part, as performing analysis, system design, maintenance, programming, troubleshooting, data access/retrieval, and problem solving within an assigned areas of responsibility (Exhibit 8). Although you also state that you serve as an advanced analyst and project leader, your supervisor, clarified that your "lead role" with regard to the Application Messaging/Integration Broker (AM/IB) operation as it relates to student refunds comprised 5% of your overall work time (Exhibit 7, page 3). In addition, Assistant Vice President for Information Technology Carmen Rahm wrote the following in the Supervisor/Department Head Review portion of the PRR (Exhibit 7, page 2):

While I agree that Crystal is the "lead" technical person for Apps Msg/Int Broker, it must be clarified that this is not a "Project Lead" position, and Apps/Msg/Int Broker is not one of the main PeopleSoft modules.

Further, Assistant Vice President Rahm emphasized that ITS 4 leads are responsible for modules within PeopleSoft such as Student Services, HR, or Financial Services and spend approximately 75% of their work time as leads. In contrast, Assistant Vice President Rahm described your primary role as "working on the Student Module" and supporting "the personnel who are assigned as the 'leads' for that module" (Exhibit 7, page 2). Even when considering your assessment of "project leader" duties as 20% of your work time, these duties do not comprise the majority of your work time.

The description of your remaining duties can be summarized as follows (Exhibit 8):

- 45% Maintaining major application systems and associated interfaces; analyzing and resolving complex issues related to assigned applications; organizing and coordinating cross-team responses to problems; developing and updating technical and user documentation; and providing related operational documentation and training to users and technical staff.
- 15% Implementing or developing application systems to meet administrative needs
- 15% Maintaining up to date knowledge and skills in information technology and services related to the university application system.

The remaining duties described on your PRR are consistent with the duties described on PDF, with the exception of the added duties related to the Application Messaging/Integration Broker, which is also consistent with your supervisor's statements.

When comparing the majority of your assigned work with the class specifications, your duties fall within the scope and intent of the ITS 3, which reads as follows:

The distinguishing characteristics for the ITS3 classification state:

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.

You support various modules within the PeopleSoft applications and develop, implement, and maintain the application system and associated interfaces within your area of responsibility. Specifically, you apply your technical knowledge and discretion to perform analysis, design, maintenance, programming, troubleshooting, and problem resolution for complex application and operational issues. You also spend a portion of your time (no more than 20%) serving as the liaison to user departments and the technical lead for the Application Messaging/Integration Broker (IB) operation of Student Refunds. The IB is a tool that interfaces the specific, larger modules of PeopleSoft that include Student Services, Human Resources, and Financial Services. Your assignments are moderate in size and deal with the primary responsibility of handling one business function, such as student refunds.

The ITS 4 position is described as the "senior-level specialist in an assigned area of responsibility and/or as a team or project leader." Incumbents will perform analysis, system design, acquisition, installation, maintenance, programming, project management, quality assurance, troubleshooting, problem resolution, and/or consulting for complex computing system, application, data access/retrieval, multi-functional database or database management systems, telecommunications, project or operation problems.

As the senior-level specialist, incumbents will apply "advanced technical knowledge" and "considerable discretion" to evaluate and resolve complex tasks to include planning and directing large-scale projects, conducting capacity planning, designing multiple-

server systems, directing or facilitating the installation of complex systems, hardware, software, and application interfaces. Further, positions at this level develop and implement testing and performance monitoring and planning and act as a liaison on the development of applications.

At the ITS 4 level, “[i]ncumbents understand the customer’s business from the perspective of a senior business person and are conversant in the customer’s business language.” Further, the majority of work performed has wide-area impact, integrates new technology, and/or affects how the mission is accomplished.

While some of your duties related to the Application Messaging/Integration Broker may be at a level of complexity envisioned at the ITS 4 level, these duties do not make up the majority of your assigned work. Further, your primary role is to provide technical support to the various modules within PeopleSoft; however, your position does not have responsibility for evaluating, resolving, planning or directing the complex technical aspects of a large-scale operation. Therefore, the ITS 3 classification best describes your position.

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 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.

c: Stephen Sarchet, CWU
Lisa Skriletz, DOP

Enclosure: List of Exhibits