



STATE OF WASHINGTON
OFFICE OF THE STATE HUMAN RESOURCES DIRECTOR

DIRECTOR'S REVIEW PROGRAM
521 Capitol Way South, P.O. Box 40911, Olympia, WA 98504-0911
(360) 664-0388 · FAX (360) 586-4694

January 13, 2012

TO: Teresa Parsons, SPHR
Director's Review Program Supervisor

FROM: Kris Brophy, SPHR
Director's Review Program Investigator

SUBJECT: Lori Wallachy v. Washington State University Vancouver
Allocation Review Request ALLO-11-037

Director's Determination

This position review was based on the work performed for the six-month period prior to April 27, 2011, the date WSU Vancouver Human Resources received Ms. Wallachy's request for a position review. As the Director's Review Investigator, I carefully considered all of the documentation in the file, the exhibits, and the written comments provided by both parties. Based on my review and analysis of Ms. Wallachy's assigned duties and responsibilities, I conclude her position is properly allocated to the Information Technology Specialist 2 classification.

Background

On April 27, 2011, WSU Vancouver HR received Ms. Wallachy's Position Questionnaire (PQ), requesting her Information Technology Specialist 2 (ITS 2) position be reallocated to Information Technology 3 (ITS 3).

WSU Vancouver HR notified Ms. Wallachy on July 25, 2011 that her position was properly allocated to the Information Technology Specialist 2 class (Exhibit A-2).

On August 23, 2011, the Department of Personnel received Ms. Wallachy's request for a Director's review of WSU-V's allocation determination (Exhibit A-1).

By notice dated October 17, 2011, Karen Wilcox, Director's Review Coordinator, acknowledged the review would be considered through written documentation only as agreed to by the parties. Ms. Wilcox set a deadline of November 10, 2011 for submittal of written arguments. The parties submitted written arguments which were received on November 10, 2011 and November 16, 2011 respectively.

By email dated December 8, 2011, I requested additional follow-up information from Ms. Merlinda Sain, Human Resource Generalist, WSU Vancouver HR. This information was submitted by Ms. Sain on December 15, 2011, with a final response received from Ms. Wallachy

on December 20, 2011. This information has been added to the record and incorporated as exhibits as noted herein.

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).

Duties and Responsibilities

Ms. Wallachy provides telecommunications network operations support for WSU Vancouver. Her position is located within the WSU Vancouver Information Technology (VIT) department. Ms. Wallachy's duties include performing IT network operations installation, monitoring, maintenance and troubleshooting functions. Her position provides telecommunications support to the University's Cisco Ethernet and wireless systems. She monitors and maintains the wireless access points across campus. Ms. Wallachy provides support to the Cisco Voice Over Internet Protocol (VoIP) system. She pre-configures and establishes phone settings prior to installation. Ms. Wallachy performs maintenance and warranty replacement functions. She also maintains the campus print server manager.

Ms. Wallachy submitted a Position Questionnaire (exhibit B-2), a revised Position Description Form (exhibit B-1) and an organization chart as part of her request. In her November 10, 2011 letter (exhibit B-9), Ms. Sain states that she reviewed the information in the Position Description form and the Position Questionnaire form submitted by Ms. Wallachy. Ms. Sain states she made her determination based on the description of work and assigned percentages of time provided by Ms. Wallachy in the position description form (see exhibit B-1).

However, in Exhibit A-3, Ms. Wallachy states the description of work provided in the PQ and PDF did not cover the entire review period. She therefore submitted a revised description of duties which better reflected the work she performed for the entire period. Upon follow-up correspondence with the parties (see exhibit B-11), WSU Vancouver agreed the revised description of duties accurately reflected her work for the review period. Thus, Ms. Wallachy describes her major job duties in exhibit A-3 as follows:

30% Network Connectivity

Campus-wide, this covers all Ethernet and wireless devices; computers, switches in work groups and departments, VLAN configurations and network infrastructure equipment in all communication closets. Perform as systems administrator assessing, monitoring and making changes to the network. This area is daily support and also a project oriented support responsibility. Under Legal requirements for ITS 3 I am certified as an AMP Premise Cable Technician. This certification was part of a training requirement for the wireless project and in preparation for two new buildings coming online. Chuck (Network & Telecom Manager) and Ryan (ITS4) also got this training.

25% VoIP

Campus-wide, impacts multiple users and groups, internal operations. On a daily basis I do digital and analog phone, fax, and Cisco conference unit support and trouble-shoot and/or provided technical support of telecommunications infrastructure using both hardware and software. Not only support for individuals but for work groups (fax, conference units) and internal support for billing. The internal support for billing is then sent out to all departments for payment. As the system administrator for several applications supporting this system I monitor performance, take corrective action, ensure licensing is current and perform upgrades to the systems. I also work with vendors when they request information about our system devices and as needed for customer support.

Respond to inquiries for customer service and equipment needs and provide information to them on capabilities and limitations of available systems.

Work with campus security officers and 911 operators on testing and making configuration changes or corrections to our "code blue" emergency phone system. Campus-wide with high impact to customers.

Perform regular audits of our Cisco Emergency Responder system to ensure all VoIP devices are reporting the correct location in the event of an emergency anywhere on campus. Affecting large workgroups or entire campus.

Advanced skills in setting up custom phone configurations for departments. Large workgroups.

18% Wireless

Wireless Project – Ongoing as funding permits. Project Lead – campus-wide wireless enhancements. Use innovative approach by using a variety of systems and tools available to perform needs analysis, review system logs and messages, schedule equipment installs, perform configuration and conduct quality assurance tests.

Wireless Daily – Handle customer reports by analyzing customer service and equipment needs using advanced hardware and software network diagnostic tools to identify problems or prove they are outside our network. Provide information to customers/clients on the capabilities and limitations of the system. System administrator of software diagnostic/configuration tool. Share results of my work with network team members and management.

15% Print Server

Project Lead – Campus-wide phase I printer VLAN and then Phase II print server project. Supervising and working with temporary and student worker on campus-wide printer project. Identified every networked printer on campus, moved to print VLAN, updated dhcp database and printers with new dns naming standards and re-installed printers on workstation using dns name, not ip or non-standard names. Two hundred twelve network printers and every user on campus

affected with minimal disruption due to planning and communication.

Programmed printer devices resulting in the ability to push out updates to remote users. Helped design and program web application where printers connected to the network are identified with location and other pertinent information for internal staff and creation of usage reports for cabinet level administrators. As this work was being done, I added each printer to the Print Server and created work flow and internal documentation on printer procedures and trained ITS 3, ITS 4 technicians and VIT management. While working on this project I used innovative project management skills in coordinating and assigning the technical work, scheduling, testing and quality assurance. Not only did I manage the project on the front end but also on the back end as system administrator for the print server.

Review system logs and messages. Investigates performance problems and put corrections in place.

Ms. Michelle Eccles, Information Systems Coordinator, is Ms. Wallachy's supervisor. Ms. Eccles did not complete or sign the supervisor's section of the Position Questionnaire or Position Description forms. However, in Exhibit B-11, WSU Vancouver confirms Ms. Eccles was Ms. Wallachy's supervisor during the review time period. In exhibit B-9, Ms. Sain states Ms. Eccles clarified Ms. Wallachy's duties as follows:

Ms. Wallachy's responsibility for the wired/wireless networks and Voice Over Internet Protocol (VoIP) has been clarified by her supervisor [Ms. Eccles] as a monitoring/managing type of role, not as a systems administrator. She monitors these systems for problems/issues and has the ability to make some minor to moderate corrections to the networks within established guidelines, in order to maintain functionality. She is not, however, responsible for needs assessments for system rebuilds, patches, developing disaster recovery tools, developing firewall/firewall rules, command prompts, graphical interface, or making sure the systems are up to date, all of which fall to a higher level systems administrator position.

The supervisor [Ms. Eccles] also indicated that complex problems are referred to a higher level position and that any changes or corrections impacting more than one system or any change that would have a large or campus-wide impact requires supervisor approval prior to implementation. With regard to VoIP system, the majority of Ms. Wallachy's duties relate to hardware installation (add/move/delete phones) out in the field providing technical support to end users, not VoIP system administration.

Summary of Ms. Wallachy's Perspective

Ms. Wallachy contends she serves as a fully-qualified information technology telecommunications specialist. Ms. Wallachy asserts she performs her work independently, which includes planning and organizing her own work and devising her own work methods to accomplish her tasks.

Ms. Wallachy asserts she exercises independent decision-making authority under the general direction of her supervisor. Ms. Wallachy asserts she reported directly to Mr. Ryan Parker rather than Ms. Eccles during the review time period.

Ms. Wallachy contends she conducts needs assessments and analyzes customer service and equipment needs using advanced hardware and software diagnostic tools and systems, and resolves complex issues or problems on her own or through consultation with higher level staff.

Ms. Wallachy asserts the majority of her work impacts large groups of people and, at times, the entire WSU Vancouver campus. Ms. Wallachy asserts she serves as a lead over lower level staff, and served as a project lead for the wireless enhancement and printer server projects she worked on during the review period.

Ms. Wallachy contends she serves as a system administrator for several systems including the Cisco Ethernet and wireless systems, and the Cisco VoIP system.

In total, Ms. Wallachy asserts the majority of her duties and the level of independence with which she works and her decision-making authority and level of responsibility as a whole reach the ITS 3 class. Ms. Wallachy asserts her position should be reallocated to that class.

Summary of WSU Vancouver Reasoning

WSU Vancouver asserts Ms. Wallachy's duties do not reach the ITS 3 level of responsibility. WSU Vancouver contends Ms. Wallachy works under general supervision rather than general direction. WSU Vancouver asserts the scope of Ms. Wallachy's work assignments and duties do not require the use of innovative approaches to complete her tasks, and that complex problems that fall outside of standard procedures and protocols are referred to a higher level staff member for resolution.

WSU Vancouver asserts the scope of Ms. Wallachy's position duties do not require maintaining overall project coordination responsibility for projects. WSU Vancouver asserts Ms. Wallachy does not serve as a systems administrator, and that the majority of her responsibilities are primarily in support of a single user or pieces of a larger system. WSU Vancouver contends Ms. Wallachy performs her other duties at a level consistent with the ITS 2 class and her position is properly allocated.

Comparison of Duties

When comparing the assignment of work and level of responsibility to the available class specifications, the Class Series Concept (if one exists) followed by the Definition and Distinguishing Characteristics are primary considerations. While examples of typical work identified in a class specification do not form the basis for an allocation, they lend support to the work envisioned within a classification.

The Class Series Concept for the Information Technology series states in relevant part:

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...IT Project Management, Systems Software, Web Development, or Voice Communications.

Ms. Wallachy's position performs information technology network operations support functions and should therefore be allocated to a class within the Information Technology series.

Comparison of Duties to Information Technology Specialist 3.

The Definition for the Information Technology Specialist 3 (ITS 3) class states:

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 independently perform IT support as a fully qualified information technology specialist within an assigned area of responsibility. Incumbents provide technical IT support and identify and resolve operational or other problems within an assigned scope of operation such as a division, or large workgroup or single business function, multiple users or more than one group. This is distinct from the ITS 2 level where the majority of assigned tasks are limited in scope, principally involving completing specified tasks or providing direct IT support to individuals or small groups of employees working within a department or unit.

The work methods used and the level of independent decision making required at the ITS 3 level often combine following pre-defined standards as well as developing innovative approaches to resolving problems or issues that arise. While fully capable of working independently, complex problems are resolved through consulting with higher-level technical staff.

Incumbents at this level use established work procedures and innovative approaches to complete assignments and projects which often impact their assigned area of responsibility. Project coordination at this level requires completing all phases of an assigned project including conducting needs assessments, creating installation plans and independently leading or supervising projects to completion.

In total, Ms. Wallachy's overall scope and level of responsibility, and her duties as a whole, do not reach the ITS 3 level of responsibility. Ms. Wallachy's position does not have complete authority for leading projects, creating installation plans, analyzing or correcting network malfunctions or serving as a system administrator. Her duties are supportive in nature to WSU Vancouver VIT departmental staff.

Ms. Wallachy does not perform all of her work assignments independently. According to Ms. Eccles, Ms. Wallachy does not have decision-making authority and discretion to resolve complex network or telecommunications system problems. The majority of her assignments involves providing direct support to single users, or involves completing assignments to a portion of the WSU Vancouver network and/or telecommunication systems. Ms. Wallachy has some latitude for discretion but works within established methods and procedures to complete routine or standard issues that arise.

Further, any changes outside this scope of responsibility, or issues having a broader impact are referred to a higher level position for approval/resolution, and any changes or corrections having a broader systems impact requires her supervisor's approval prior to implementation. Ms. Wallachy does not have the authority to implement changes without prior approval of her supervisor. This limits her overall scope of responsibility and level authority for working independently.

Ms. Wallachy's position does not fully reach the ITS 3 level of responsibility of providing overall project coordination for her assigned projects. During the review period, Ms. Wallachy worked on a wireless enhancement project. Ms. Wallachy participated in configuring and installing new and replacement wireless access points across campus. In exhibit A-5, Ms. Wallachy acknowledges her duties were supportive in nature to the completion of the overall project under the guidance of Ryan Parker, ITS 4. Ms. Wallachy was provided the configurations and wireless access points by Ryan Parker. Ms. Wallachy's responsibilities primarily involved performing the physical installation phase of the project. She coordinated and lead the work of a lower level IT technician, working within established procedures to complete her tasks. Ms. Eccles stated that Ms. Wallachy did not have authority to deviate from established procedures or make significant changes that would impact the overall project. This is consistent with ITS 2 level responsibility.

A portion of Ms. Wallachy's work involves performing higher level ITS 3 duties. Approximately 15% of Ms. Wallachy's time during the review period was spent maintaining the campus print server and working on a printer VLAN and print server project. As stated in her description of duties, the aspects of her work involving helping to design and program the web application so that printers connected to the network are identified with location and other pertinent information and programming printer drivers so that updates could be pushed out to remote users reach ITS level 3 responsibility. However, the remainder of her duties on the project, which include identifying every networked printer on campus; moving to print VLAN; updating the dhcp database and printers with new dns naming standards and re-installing printers on workstations; adding printers to the Print Server and creating work flow and internal documentation on printer procedures; and her ongoing server maintenance functions are consistent with the ITS 2 level responsibility.

In total, Ms. Wallachy's project coordination responsibilities do not include the full scope of responsibility for conducting needs assessments, creating installation plans and independently leading or supervising her overall projects to completion. As a whole, her duties are supportive in nature to higher level technical IT staff.

According to her supervisor, Ms. Wallachy does not serve as a systems administrator for the WSU Vancouver wired/wireless networks and VoIP system. Ms. Wallachy monitors these systems for problems and issues and makes minor to moderate corrections to the networks within established guidelines in order to maintain functionality. According to her supervisor, a higher level staff position performs network systems administrator functions including conducting needs assessments for system rebuilds and patches and developing disaster recovery tools. This also includes developing firewalls and firewall rules, command prompts, and graphical interfaces. According to her supervisor, the majority of Ms. Wallachy's duties relating to the VoIP system principally involve adding, moving, and deleting phones out in the field and providing technical support to end users.

The majority of Ms. Wallachy's duties impact individual end users throughout the WSU Vancouver campus. While Ms. Wallachy provides technical support to individuals across the entire university, her work is limited in scope to providing technical IT support to the end users themselves. This scope of responsibility does not reach the ITS3 level of independently providing technical IT support and identifying and resolving problems within an assigned scope of operation such as a division, or large workgroup or single business function, multiple users or more than one group.

The WSU VIT department provides technical support to the University's IT telecommunications infrastructure. Ms. Wallachy's position provides network operations support for the VIT department. Ms. Wallachy's overall scope and level of responsibility, complexity of duties, level of analysis and level of decision-making authority do not reach the ITS 3 class definition. In total, the majority of her work does not reach the level of responsibility required by this class.

Comparison of Duties to Information Technology Specialist 2.

The Definition for the Information Technology Specialist 2 (ITS 2) class states:

In support of information systems and users, performs standard consulting, analyzing, programming, maintenance, installation and/or technical support.

Under general supervision, follows established work methods and procedures to complete tasks on computers and/or telecommunication software/hardware, applications, support products, projects, or databases for small scale systems or programs or pieces of larger systems or programs. Performs standard tasks such as consulting with customers to identify and analyze technology needs and problems; responding to and resolving trouble reports from users; processing equipment and service orders; coordinating installations, moves, and changes; analyzing problems for parts of applications and solving problems with some assistance; supporting and enhancing existing applications in compliance with specifications and standards; conducting unit, system or usability testing; writing specifications and developing reports; developing and conducting application, software and/or system operation training for users; or serving as part of a problem solving team addressing more complex issues. The majority of tasks are limited in scope and impact individuals or small groups. Complex problems are referred to a higher level.

The Glossary of Classification Terms defines general supervision as:

Recurring assignments are carried out within established guidelines without specific instruction. Deviation from normal policies, procedures, and work methods requires supervisory approval, and supervisory guidance is provided in new or unusual situations. The employees work is periodically reviewed to verify compliance with policies and procedures.

Ms. Wallachy's responsibilities for troubleshooting and repairing network problems and devices on the WSU Vancouver campus, and the scope and level of her responsibility for providing WSU Vancouver's network and telecommunications support, are consistent with these statements.

Ms. Wallachy works under general supervision and carries out her duties and responsibilities following established guidelines. As stated by her supervisor, Ms. Wallachy monitors the wired/wireless and VoIP networks for problems and resolves issues with the ability to make minor to moderate corrections to the networks within established guidelines to maintain functionality. Ms. Wallachy has some latitude when working within established methods and procedures on routine or standard issues. However, complex issues having a broader impact to the networks are referred to a higher level IT specialist position for resolution.

Ms. Wallachy performs work in support of WSU Vancouver network operations. She performs standard tasks such as consulting with customers to identify and analyze problems; responding to and resolving trouble reports from users; troubleshooting network problems and devices on WSU Vancouver campus including routers, switches, computers and printers, activating network devices, as well as editing and deleting network devices on the Domain Name Server and DHCP servers. She traces network and telecommunication cables in the wiring closets to troubleshoot and make repairs or new connections. Ms. Wallachy troubleshoots network problems between computers to the switch, resolving issues or referring complex problems to higher level specialists for resolution. Her duties include monitoring and supporting networks in compliance with specifications and standards; documenting procedures; and conducting training for users.

Ms. Wallachy's project coordination role including leading lower level staff to configure and install sixty new and twenty replacement wireless access points in the campus' LIB, MMC, CLS & ELS buildings is consistent with ITS 2 definition's statement: "coordinating installations, moves, and changes."

Ms. Wallachy's responsibilities for responding to and resolving trouble reports from users; troubleshooting technical problems, diagnosing network problems, and monitoring and supporting networks are consistent with the level of work stated in the ITS 2 definition. In total, the overall scope and level of responsibility of Ms. Wallachy's position are consistent with ITS 2 level work. The primary thrust of her position, and the majority of her duties, falls within the scope and level of responsibility stated by the ITS 2 definition.

Based on the level, scope and diversity of the overall duties and responsibilities assigned to Ms. Wallachy's position, her position is properly allocated to the ITS 2 classification.

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 P.O. Box 40911, Olympia, Washington, 98504-0911. The PRB Office is located at 521 Capitol Way South, Olympia, Washington. The main telephone number is (360) 664-0388, and the fax number is (360) 586-4694.

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

c: Lori Wallachy, WSU Vancouver
Jason MacKay, Staff Attorney, PSE
Merlinda Sain, WSU Vancouver
Lisa Skriletz, OSHRD

Enclosure: List of Exhibits

LORI WALLACHY v WSU VANCOUVER ALLO-11-037

A. Exhibits received from Lori Wallachy

1. Letter of appeal dated August 23, 2011 requesting a Director's Review
2. Copy of WSU Vancouver allocation determination letter dated July 25, 2011 from Merlinda Sain to Lori Wallachy.

Cover letter from Jason MacKay to Karen Wilcox dated October 10, 2011 submitting Ms. Wallachy's exhibits to the appeal:

3. Narrative response by Ms. Wallachy to the "Position Summary" and "Results of Classification Review of Position #101234 from WSU Vancouver.
4. Declaration of Ryan Parker dated October 3, 2011.

Additional exhibits:

5. Written argument submitted on behalf of Ms. Wallachy from Jason MacKay dated November 16, 2011.
6. Lori Wallachy written final response to Ms. Sain's e-mail dated December 15, 2011 regarding supervisor Michelle Eccles.

B. Exhibits received from WSU Vancouver

Cover page from WSU Vancouver submitting exhibits, received September 14, 2011:

1. Employee-generated Position Description received by WSU Vancouver HR, date stamped April 27, 2011.
2. Position Description Supplement completed by Lori Wallachy, date stamped April 27, 2011.
3. Employee-generated Position Questionnaire received by WSU Vancouver HR, dated stamped April 27, 2011.
4. Position Questionnaire Supplement completed by Lori Wallachy received by WSU Vancouver April 27, 2011.
5. Employee-generated Organizational Chart.
6. Position Description for Lori Wallachy on file at time of the review period.
7. WSU Vancouver VIT Organizational Chart on file at time of the review period.
8. Current Organizational Chart for WSU Vancouver VIT, dated 8/31/2011.
9. WSU Vancouver written response dated November 10, 2011 from Merlinda Sain.
10. November 17, 2011 email from Ms. Sain to Karen Wilcox stating WSU will not submit a rebuttal to Ms. Wallachy's written argument.
11. E-mail from Merlinda Sain to Kris Brophy dated December 15, 2011 providing a response regarding supervisor of record (Michelle Eccles) for Lori Wallachy's position.

C. Class Specifications

1. DOP Class specification for IT Specialist 1, (479I)
2. DOP Class Specification for IT Specialist 2 (479J)
3. DOP Class Specification for IT Specialist 3 (479K)