



**STATE OF WASHINGTON  
OFFICE OF FINANCIAL MANAGEMENT**

STATE HUMAN RESOURCES DIVISION | DIRECTOR'S REVIEW PROGRAM  
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January 15, 2014

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

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

SUBJECT: Keith Davison v. Washington State University (WSU)  
Allocation Review Request ALLO-13-035

**Director's Determination**

This position review was based on the work performed for the six-month period prior to January 24, 2013, the date WSU Human Resources received Mr. Davison's request for a position review. As the Director's Review Program Investigator, I carefully considered all of the documentation in the file, the exhibits, and the verbal comments provided by both parties during the review telephone conference. Based on my review and analysis of Mr. Davison's assigned duties and responsibilities, I conclude his position is properly allocated to the Warehouse Operator 2 classification.

**Background**

On January 24, 2013, WSU HR received Mr. Davison's Position Questionnaire (PQ) requesting that his Warehouse Operator 1 position be reallocated to the Surplus Inventory Control Specialist 2 classification (Exhibit B-2).

By letter dated April 5, 2013, WSU HR notified Mr. Davison that the request to reallocate his position to Surplus Inventory Control Specialist 2 class was denied, but that the scope of his duties warranted reallocation to the Warehouse Operator 2 classification (Exhibit B-1).

On May 1, 2013, State Human Resources received Mr. Davison's letter appealing WSU's allocation determination (Exhibit A-1).

I conducted a Director's review telephone conference with the parties on November 7, 2013. Present during the conference were Mr. Keith Davison, Mr. Rick Finch, Waste Management Manager, Mr. Ron Redmond, Program Support Supervisor 2, and Ms. Sabrina McPherson, Human Resource Consultant, WSU HR.

### **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**

Mr. Davison supports the self-sustaining Surplus Stores operations within the Waste Management department on the University's main campus. Mr. Davison's position has primary responsibility for performing a variety of inventory processing for Surplus Stores operations involving the pickup, receiving, segregating, evaluating, processing, movement and storing of the University's surplus materials. His position also participates in the Surplus Store's sales activities, and he performs duties associated with campus-wide collection and destruction of University confidential data and information. Mr. Davison participates in the organization and cleanliness of the Surplus Store warehouse and outside staging areas.

Mr. Davison's duties and responsibilities are summarized from the PQ (Exhibit B-2) as follows:

#### 50% Inventory Processing

- Evaluate surplus materials to identify proper disposal through waste, recycle, sales or auction.
- Research surplus merchandise determining most suitable sales format (i.e. pre-priced, online, auction or special sales)
- Establish appropriate pricing of surplus materials for departmental, agency, NPO and public sales.

#### 20% Surplus Acquisition

- Accept and maintain daily surplus pickup requests from online system/facilities focus and coordinate pickups with department personnel.
- Reconcile Surplus Disposal Requests with Inventory at location or in warehouse.
- Drive 18500 GVW truck for collection of surplus items. Communicate Surplus SOPs and BPPM to department personnel.

#### 20% Surplus Sales

- Create signage and setup displays for surplus items.
- Operate sales till under established WSU cash handling policies.
- Prepare surplus auctions; duties include: tagging auction lots; catalog preparation; clerking and invoicing.
- Assist with online sales through listing preparation, sales assistance and shipping.

- Assist customers during all hours of operations.

5% Confidential Document and Media Destruction

- Collect confidential materials from campus departments.
- Perform routine confidential data destruction, this includes but is not limited to: paper, hard drives, floppy drives, CD Rom's, PDA devices, pen drives.
- Operate VecoPlan Industrial Shredder and auto-tie baler.
- Assist with the monitoring of efficiencies for shred pickups and scheduling.
- Process accurate paperwork for revenue and data tracking.
- Adhere to detailed operating procedures implemented for confidential data destruction.
- Assist with confidential digital media inventory and storage.

5% Other

- Perform routine maintenance and cleaning of departmental equipment and vehicles.

Mr. Ron Redmond, Surplus Supervisor, is Mr. Davison's supervisor. Mr. Redmond completed the supervisor's section of the Position Questionnaire and indicates the information provided by Mr. Davison indicating lead responsibility over temporary Service Worker 2 positions as noted on submitted organization chart is not fully accurate and complete. In his comments, Mr. Redmond indicates there is a Warehouse Operator 3 position which has designated Lead responsibility over Mr. Davison's position. Mr. Redmond states in his comments that the Warehouse Operator 3 position makes daily assignments and checks the work of Mr. Davison and the other Surplus Stores staff which includes the Service Worker positions. Mr. Redmond states in his comments that Mr. Davison, "...does work with time slip employees and at times may need to explain tasks in more detail or assist with some on the job training which would be considered routine teamwork."

In exhibit A-13, Mr. Redmond states that the, "...WSU Surplus Stores warehouse is not a typical receiving warehouse where you have pallets of stock that is being received and shipped in prepackaged containers like you might see at a freight transfer station. Our building is set up and organized as a used merchandise store. The surplus items in our building are displayed and organized for sale, not for prep to be loaded onto a semi or delivery truck."

Summary of Mr. Davison's Perspective

Mr. Davison asserts his position does not fall within the scope of the Warehouse Operator series. Mr. Davison asserts the Warehouse Operator series is intended to describe positions located within a central warehouse or a major area within a large warehouse. Mr. Davison contends the scope of this work does not involve performing warehousing functions devoted to the movement of materials within a warehouse setting. Mr. Davison asserts the primary focus and scope of his position does not involve performing warehouse functions.

Instead, Mr. Davison asserts the primary focus of his position is to process and dispose of surplus materials. Mr. Davison contends his primary duties involve handling surplus property and performing related inventory control activities to support the sale of surplus items and equipment through the University's Surplus Stores' operations. Mr. Davison contends any warehousing-related activity he performs is incidental to the disposal of surplus items for the University.

### Summary of Washington State University's Reasoning

Ms. McPherson, WSU-HR asserts that while Mr. Davison receives, evaluates, and segregates surplus property as stated in the SICS 2 definition, the majority of his duties fall within the functions identified in the Warehouse Operator class series concept.

Additionally, Ms. McPherson contends that although Mr. Davison performs a variety of manual labor and routine clerical work in warehouse functions, as outlined in WO 1 class, the information and materials provided by Mr. Davison as well as management's input, reflects that Mr. Davison performs the majority of his duties at a journey level. For these reasons Ms. McPherson asserts that Mr. Davison's position is properly allocated to the WO 2 class.

### Comparison of Duties to Class Specifications

When comparing the assignment of work and level of responsibility to the available class specifications, the class series concept (if one exists) followed by 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.

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. Dudley v. Dept. of Labor and Industries, PRB Case No. R-ALLO-07-007 (2007).

### Comparison to Surplus Inventory Control Specialist 2

The Definition for the Surplus Inventory Control Specialist 2 class states:

Under the direction of higher level surplus and inventory control specialist receives, evaluates and segregates State surplus personal property scheduled for redistribution or disposal action.

There are no Distinguishing Characteristics for the Surplus Inventory Control Specialist 2 class; therefore one can look to the typical work statements for guidance (see: Mansfield v Dept. of Fish and Wildlife, PRB Case No. R-Allo-11-014.) The following typical work statements describe the type of work performed by incumbents in these positions:

Receives and issues surplus property;

Evaluates and assesses appropriate sale price of incoming State surplus personal property;

Identifies surplus property for priority, public, internet sales, or recycle;

Determines items to be placed on electronic inventory system;

Supervises warehouse staff in the absence of Warehouse Operator 4;

Oversees daily customer pickups for priority and public sales;

The definition for this class generally describes Mr. Davison's responsibility for receiving, evaluating and segregating the University's surplus personal property scheduled for redistribution or disposal action. It is uncontested that Mr. Davison's duties support the processing and disposal of the University's surplus materials across campus. His duties consist of performing a variety of manual labor tasks and related routine clerical activities to support the sale of surplus items and equipment through the University's Surplus Stores' operations.

However, while Mr. Davison performs these functions, when looking at the class as a whole, Mr. Davison's position does not fully rise to the scope or level of responsibility anticipated by this class.

Although the typical work statements are not allocating criteria, they do provide direction as to scope and level of responsibility associated with the duties performed at this level. For example, it is anticipated that positions in this class supervise warehouse staff in the absence of Warehouse Operator 4's (or equivalent). Mr. Davison's position does not have this level of responsibility.

Mr. Ron Redmond, Surplus Supervisor, is Mr. Davison's supervisor. In his comments, Mr. Redmond indicates Mr. Campbell, Warehouse Operator 3, has designated Lead responsibility over Mr. Davison's position. Mr. Redmond indicates that as the designated Lead, Mr. Campbell makes daily work assignments and checks the work of Mr. Davison and the other Surplus Stores staff which includes temporary Service Worker positions. Mr. Redmond states that Mr. Davison "...does work with time slip employees and at times may need to explain tasks in more detail or assist with some on the job training which would be considered routine teamwork." In total, Mr. Davison reports to a lead position for his daily work assignments. This does not reach to the overall level of reporting relationship or scope of duties which includes supervising Warehouse Operator 4 level staff in the absence of his supervisor as intended.

Further, positions at this level evaluate and assess the appropriate sales price of incoming State surplus personal property. Mr. Ron Finch, Waste Management Manager, stated during the review conference that Mr. Davison has delegated authority to determine the level of disposal and the relative value of surplus items for resale. He stated that Mr. Davison may do some limited research before determining values, but that the Mr. Campbell takes responsibility for establishing the pricing and sale of specialty online auctions for complex high-dollar surplus items such as lab equipment and other specialty items. This limits the degree to which Mr. Davison has responsibility for evaluating and assessing the appropriate sale price of incoming State surplus personal property at the level intended.

In addition, this class describes positions which have responsibility to oversee the daily customer pickups for priority and public sales. Mr. Davison's position does not reach this overall scope of responsibility. This responsibility rests with Mr. Campbell. During the review conference it was stated that Mr. Campbell's duties include organizing the daily work load of the warehouse staff, which includes overall responsibility for overseeing the daily customer pickups and deliveries of surplus items and equipment.

There is another series which addresses the level of responsibility assigned to Mr. Davison's position. Because there is another series which more accurately describes the primary focus,

scope of work, and specific duties performed by Mr. Davison, allocating his position to the Surplus Inventory Control Specialist 2 class is not appropriate.

### Comparison to Warehouse Operator 2

The Class Series Concept for the Warehouse Operator Series states:

Positions in this class series either supervise or perform warehouse functions in a central warehouse or a major area within a large warehouse. These positions are located in separate buildings devoted to receiving, storing and shipping supplies, equipment, furnishings or provisions.

The Definition for Warehouse Operator 2 states:

This is the journey level of the series. Performs warehouse functions in a major area within a large warehouse or independently operates a small or decentralized warehouse; receives, records, stores, issues, and ships stock and supplies; and disposes of surplus property.

The class series concept for the WO series describes positions which perform warehousing functions involving the receiving, storing and shipping supplies, equipment, furnishings or provisions. Positions at the WO 2 level perform this work at the journey level and in addition, have responsibility for the disposal of surplus property.

On a best fit basis, the overall focus and scope of Mr. Davison's position, and the majority of his duties as a whole, are more accurately described by the Definition of the Warehouse Operator 2 classification. Mr. Davison supports the Surplus Stores sale, disposal or re-purposing of the University's surplus property. He assists in preparing WSU Surplus Stores facility for weekly public sales and monthly/bimonthly live auctions. It is uncontested that Mr. Davison's duties support the disposal of the University's surplus property. In addition, the scope of his position, and the thrust of his duties as a whole, generally conforms to the requirements of this class of receiving, storing and shipping materials and equipment within a warehouse setting as required.

According to the PQ for his position, the majority of Mr. Davison's time is spent independently supporting the sales of surplus equipment for the Surplus Store. This includes receiving a variety of surplus equipment, determining its fair market value, moving and storing the materials or equipment prior to online or other types of sales to various university departments, state agencies, non-profit organizations and the public.

Mr. Davison also assists in the preparation and maintenance of the WSU Surplus warehouse for weekly public sales and monthly/bimonthly live auctions. This includes assisting with surplus sales activities. He is responsible for working with other staff to create signage set up displays for surplus items. He also assists in prepare surplus items for periodic auctions. This includes tagging auction lots, preparing catalogs, clerking and performing invoicing activities. He also assists with online sales by preparing sales lists, and providing sales assistance which includes preparing materials for shipping.

Mr. Davison performs related warehouse operator activities within the facility to facilitate the surplus sales process. For example, Mr. Davison coordinates, sets up and moves surplus items

within and around the warehouse facility to make room for incoming equipment or other surplus items.

Mr. Davison also assists customers with loading items that have been sold or auctioned. This usually includes using hand trucks but also includes using a forklift to move large and heavy pallets which can weigh from several hundred to several thousand pounds.

All of these duties fall within the scope of responsibility stated by the typical work statement of this class, "Oversees disposal of surplus or excess property."

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).

In this case, the majority of the duties assigned to Mr. Davison's position and the scope and level of assigned responsibilities are more accurately described by the Warehouse Operator 2 classification. On a best fit basis, Mr. Davison's position should remain allocated to that class.

### **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 on the 4<sup>th</sup> floor of the Insurance Building, 302 Sid Snyder Avenue SW, Olympia, Washington. The main telephone number is (360) 902-9820, and the fax number is (360) 586-4694.

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

c: Keith Davison, WSU  
Sabrina McPherson, WSU  
Lisa Skriletz, SHR

Enclosure: List of Exhibits

**KEITH DAVISON v WSU**  
**ALLO-13-035**

List of Exhibits

A. Keith Davison Exhibits

1. Letter of appeal from Keith Davison requesting a Director's Review received by State HR on May 1, 2013
2. Director's Review Form received by State HR on May 1, 2013
3. April 5, 2013 memo from Sabrina McPherson enclosing WSU allocation determination regarding Keith Davison's position
4. Copy of Position Questionnaire (PQ) for Keith Davison's position date-stamped January 24, 2013
5. Attachment to PQ titled, "Form A"
6. Document listing work hours titled, "Time Card Hours"
7. Supervisor Response section to Position Questionnaire received by WSU HR February 20, 2013
8. Position Summary for Keith Davison's position
9. Organizational Chart for Surplus Stores department
10. March 19, 2013 email from Ron Redman to Sabrina McPherson regarding work hours
11. Surplus Work flow schematic
12. PQ response by supervisor Ron Redman (duplicate of A7)
13. Letter from Ron Redman, Surplus Supervisor, June 17, 2013
14. Letter from Mike Campbell, WO3 WSU Surplus, June 17, 2013

B. WSU Exhibits

Cover letter from Sabrina McPherson to Karen Wilcox dated May 31, 2013 enclosing the following exhibits:

1. WSU Allocation determination memorandum April 5, 2013
2. Position Questionnaire (PQ) for Keith Davison's position date-stamped January 24, 2013
3. Supervisor Response section to Position Questionnaire received by WSU HR February 20, 2013, titled, "Documents submitted by Mr. Davison's supervisor"
4. Document listing work hours titled, "Time Card Hours Breakdown"
5. Resource Planning and Business Services Organizational Chart

6. Position Description for Keith Davison – does not include signatures or date
7. State HR Class Specification for Warehouse Operator 1
8. State HR Class Specification for Warehouse Operator 2
9. State HR Class Specification Surplus Inventory Control Specialist 2