

PUBLIC SERVICE REPRESENTATIVE SERIES

EXECUTIVE SUMMARY

NOVEMBER 1995

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State policy prescribes the responsibilities of the agencies and the Human Resource Management Division regarding the allocation of positions to classifications. These responsibilities were further defined during the last legislative session. House Bill 2192 amended ORS 240.215(2) to include the following:

"The allocation of positions within the various operating agencies to the classifications in the classification plan shall be performed by the agency appointing authority with post-audit review by the division. Agencies shall allocate positions to the available class that most accurately describes the work based upon the assigned duties, authorities and responsibilities. If a position is found to be misallocated, the agency shall change the allocation of the position to the proper class for the work, whether or not the assigned duties have changed since the previous allocation decision."

This audit was conducted pursuant to this new legislation, and to [State Policy 30.000.01](#). The classification series that includes Public Service Representative 1 through 4 was selected for review.

There are 446 positions with incumbents in this classification series, in 36 agencies. Thirty-six positions were reviewed, in 25 agencies. These reviews included an analysis of the current position descriptions, interviews with the incumbents and their supervisors, and consideration of any additional information submitted by agencies. The following findings were made:

- Thirty positions (83%) were correctly allocated
- Two positions (6%) were allocated to an incorrect level within the series.
- Four positions (11%) should be allocated to a classification series other than Public Service Representative.
- Five position descriptions (14%) did not accurately reflect the assigned duties and responsibilities.
- Eight position descriptions (22%) were not signed/dated by one or more of the required signatories.

CONCLUSIONS AND RECOMMENDATIONS

Conclusion:

Six of the 36 (16.7%) audited positions in the four levels of the Public Service Representative classification series were found to be misallocated. These were variously due to changes in assigned duties, apparent misunderstandings of the distinctions between the PSR and admin/clerical classifications, and in at least one case a funding issue.

Recommendations:

Each of the effected agencies has been separately advised of the misallocations, and of their responsibility to initiate corrective action consistent with considerations regarding represented or unrepresented employees. Corrective action may include such alternatives as reclassification of the position or the realignment of duties.

[State Policy 30.000.01 \(Position Management\)](#) prescribes in Section (1)(e) that appointing authorities review position allocations periodically and correct any allocation errors. This process is accomplished by some agencies at the time of the annual performance appraisal, and is a specific "check-off" item for supervisors at the time of the performance review. This ensures that a PD review is made at least annually. We recommend that all agencies adopt a similar practice, if one is not now in place.

Section (1)(d) of the same policy prescribes that planning should be accomplished regarding the impact on specific position classifications and related positions before assigning a change in duties, authorities and responsibilities. We recommended that agencies incorporate a position impact review into any plan for reorganization or other evolution that may affect assigned duties of positions.

Budgetary and funding issues must be addressed separately from position allocation. The use of work out of class differentials pending budget resolution or the realignment of assignments to remove the higher level duties are both appropriate techniques to use to comply with both the personnel and fiscal requirements established by policy.

Conclusion:

Duties were not accurately reflected in the PDs in five cases. These included circumstances where duties had changed since the PD had been written (whether or not the allocation was appropriate), and other cases where the PD had not initially been written to completely or accurately reflect the assigned duties of the incumbent.

Recommendations:

As discussed in the first set of recommendations above, periodic review to detect circumstances where duties have evolved over time should be established if not currently in place. The incorporation of position impact reviews in planning for organizational changes should also be done, to trigger the necessary updating of PDs as well as assessing the impact on incumbents.

Training on position allocation is available through HRMD for agency personnel officers and others with responsibilities for writing PDs and conducting position allocation reviews.

Conclusion:

In eight cases, PDs were not signed/dated in accordance with [State Policy 30.000.01](#)

Recommendations:

We recommend that agencies establish internal procedures, if not currently existing, to ensure that new or revised PDs are reviewed for completeness and accuracy before filing.