

# Department of Administrative Services



## **Understanding the Differences between Classifications**

Office Specialist, Administrative Specialist, Program Analyst, and OPA

# Agenda

- 01 Definitions
- 02 Discussing the Office Assistant and Office Specialist
- 03 How the Office and Administrative Specialist differ
- 04 What's a "Program"?
- 05 Program Analyst and OPA
- 06 Bonus – Overlap of duties



# Definitions



**Clerical** – Work that involves processing data normally initiated elsewhere or that can be readily ascertained and subject to verification, revision, correction, and forwarding for action, referral or archiving.

This work is structured, often repetitive and performed in accordance with established guidelines.

Clerical work typically involves general office or program support duties such as preparing, receiving, reviewing and verifying documents; processing transactions; maintaining office records; locating and compiling data or information from files; keeping calendar and informing others of deadlines.

These are typically the Office Assistant and Office Specialist type positions.

# Definitions



**Paraprofessional/Technical** – Jobs that require specialized extensive practical knowledge gained through experience and/or specific formal or on-the-job training.

Work is usually associated with or supportive to a professional function or occupation. The tasks, methods, procedures, and computations that are covered by established precedents or guidelines and often require a high degree of skill, care, and precision.

Work in these occupations may involve substantial elements of the work of the professional or administrative field but requires less than full knowledge of the field involved.

**Paraprofessional/Technical** are jobs that require extensive practical knowledge, and they are typically supporting a professional function or occupation.

For example, the Administrative Specialist Series is a paraprofessional/technical classification that is intended to perform and/or coordinate administrative tasks in support of an agency Program or Operation.

Because the focus of the Paraprofessional/Technical classifications are to support a professional function or occupation, they tend to not be responsible for clerical support type work, which is why the Administrative Specialist class spec says they should have limited, if any, general office support duties.

# Definitions



**Professional** – A field of activity, type of work or vocation that requires specialized knowledge typically acquired from college course work at the bachelor’s degree level or beyond.

A professional job is a career that typically requires a specific amount of advanced training and education. These jobs often require some level of post-secondary education (some college or college degrees).

# Office Assistant and Office Specialist



Job Profile Specification	Minimum Qualifications	Salary Information
<b>Office Assistant 1 (0101)</b>		
<b>Office Assistant 2 (0102)</b>		
<b>Office Specialist 1 (0103)</b>		
<b>Office Specialist 2 (0104)</b>		

**GENERAL DUTIES:** This class is defined by the following general duties:

**REQUIREMENTS:** This class is defined by the following requirements:

**RELATIONSHIPS:** This class is defined by the following relationships:

**SUPERVISORY:** This class is defined by the following supervisory responsibilities:

These classes represent a continuum of clerical positions. They are not position specific classes but portray a type and level of work through example.

# Office Assistant and Specialists



Function	Office Assistant 2	Office Specialist 1	Office Specialist 2
<b>Records Processing</b>	Completes forms and records	Examines applications, reviews for accuracy and completeness, compares data from different sources, determines which is correct, determines actions to obtain missing or correct information.	Uses independent judgment to select a course of action based on law, rules, etc., makes final determination to process; reconstructs records, resolves problems, etc.
<b>Correspondence</b>	Types from draft or detailed instructions and may compose simple responses to routine inquiries.	Types a variety of correspondence from draft or general instructions; composes and types responses to inquiries requiring general knowledge of agency operation.	Researches information to respond to inquiries, determines what needs further research and what is needed; composes, types and may sign (for superior) responses to a variety of correspondence.
<b>Telephone</b>	Answers phones and responds to questions.	Responds to specific inquiries, explains and clarifies rules, provides information about services available by applying established rules, policy and procedures as guidelines.	Responds to general questions about specific agency/ program information and services (note the change in emphasis from a case specific to overall program type of inquiry). Analyzes situations to determine most appropriate course of actions within established procedures. Required to apply numerous guides and they are less detailed and explicit.

Examples of the type of work expected for these clerical classifications, and how each level would approach the work differently. Arranged in this way you can see how the level of complexity, authority, and responsibility increases and the classifications go up.

As a series of general classes, there is some overlap between levels.

The Office Assistant 1 performs simple and repetitive clerical tasks, requiring limited or no knowledge of agency operations. This is the entry level into the clerical field.

The Office Assistant 2 does a “variety of routine clerical/secretarial tasks following established work methods and procedures.” Variety allows for several different activities. Positions that do routine duties in several areas should be allocated to the Office Assistant classification.

The Office Specialist 1 adds “wide” to variety and directly identifies work that requires the employee to “determine work methods and procedures.” It also requires “the application of agency policies and procedures and the exercise of initiative and judgment.” From this, you can see that the Office Specialist 1 portrays a different

type and level of work.

At the OS2 level, there is the addition of administrative and technical assignments. At this level, work assignments “involve different and unrelated processes and methods” and require “analyzing situations and making decisions on selecting the most appropriate course of action within established procedures.” The higher classification identifies an essentially different level of work.

Also, at the OS2 level, there are several important additions to the basic nature of the work – fundamentally different kinds of work assignments, less explicit work guides and precedents, and the inference that there are generally multiple possible actions, and the employee selects the proper action through analysis and judgement.

# Office Assistant and Specialists



Function	Office Assistant 2	Office Specialist 1	Office Specialist 2
<b>Reports</b>	Complies simple reports using information immediately available.	Does not directly address report preparation. This does not mean that such a duty may not be associated with the class. In analyzing this aspect of a position in relation to the OS1, you should look at how the duty is described in the OA and OS2, as well as how the class describes dealing with records (kind of information, variety of sources, judgment used, etc.) to understand how report preparation duties relate to the OS1 class spec.	Collects and complies data requiring specialized program knowledge as well as judgment in selecting from a variety of sources (in other words, to figure out what to look for and where to find it), makes presentations.
<b>Work Review</b> (A measure of work itself. Not supervisory confidence. Prescribed actions from detailed instructions may limit the need for review)	Work is reviewed regular for accuracy and timeliness.	Work is reviewed for conformance to guidelines and procedures.	Work is reviewed upon completion or as problems occur.

Keep in mind, these classes from a continuum. The distinctions are relative and there is overlap. Be careful of taking a duty or phrase out of context or focusing on just one aspect of the position or class.

Don't forget that the class specs are illustrative of a type and level of work. It does not reflect any single position. Good allocation decision require analysis of all significant aspects of the position in relation to the overall type and level of work described in the class spec.

This information is taken from the class specs and put in a side-by-side chart to show how the work changes as the classification levels increase.

# Office Specialist vs. Administrative Specialist



## Office Specialist

**Clerical – involves general office or support duties**

- Preparing, receiving, reviewing, and verifying documents
- Processing transactions
- Maintaining office records
- locating and compiling data or information from files
- keeping calendar
- informing others of deadlines

## Administrative Specialist

**Paraprofessional/Technical – performs/coordinates administrative tasks in support of an agency Program or Operation.**

- Limited (if any) general office support duties.
- Supports the ongoing direction of an agency **Program** or **Operation**.
- Work is related to policies, rules, regulations, and laws.

When looking at the Office Specialist series and the Administrative Specialist series, it can be easy to get these confused, or think that the Administrative Specialists are higher level Office Specialists. That's not an accurate assessment. Office Specialists are clerical in nature, where Administrative Specialists are paraprofessional and technical level positions who are not focused on clerical work.

**Administrative is defined as “work relating to the implementation and execution of policies, rules, regulations, and laws concerning agency programs and operations. Work involves the exercise of analytical ability, research, judgment, accountability, and an in-depth knowledge of concepts and practices in the management of an agency program or operation.”**

From that perspective, the Office Specialist is performing clerical duties that support the unit/section or program/operation as its primary purpose and focus, while the Administrative Specialist is assisting with the running of the Program or Operation through research, analysis, evaluation, development of procedures, systems, and forms necessary to ensure the efficient flow of information, workflow, or the delivery of services.

# Office Specialist vs. Administrative Specialist



## Office Specialist

- Work is primarily supporting the day-to-day office function.
- Work is clerical in nature.
- Work is performed in accordance with established policies, procedures, or techniques.

## Administrative Specialist

- Work is performing or coordinating administrative functions.
- Responsible for assisting with ensuring the smooth function of the Program or Operation.
- Performs limited (if any) general office support duties.
- Not an advanced clerical position (e.g., OS3 or OS4).

When looking at the Office Specialist series, the primary purpose should be related to general office or section/unit support.

Ask yourself,

- Is the position's purpose office support work?
- Is that work clerical in nature?
- Is the work performed in accordance with established policies, procedures, or techniques?

If so, it's doing Office Specialist work.

At the Administrative Specialist level, that clerical/office support work is not the focus. The Administrative Specialist **is not** helping a manager do their job by scheduling the manager's meetings, checking calendars, triaging emails, filing, answering the phone, or other office support/clerical type work.

The Administrative Specialist emphasizes either agency-wide process coordination or administrative support such as identifying and reporting the effect of legislative

change on Program/Operation processes or compiling and reporting Program/Operation performance indicators.

Their purpose is to assist Program Analysts and/or OPAs in ensuring that the Program or Operation is running smoothly and assisting in the ongoing direction of that Program or Operation.

Ask yourself,

- Is the work related to performing or coordinating support of administrative functions related to ensuring the smooth running of a Program or Operation?
  - If so, how?
- Does the position perform limited (if any) general office support or clerical duties?

Because of this, Administrative Specialists are not advanced Office Specialists, they're not OS3s and OS4s, they're a completely different classification that's not related to office support or clerical work and is closer to the Program Analyst or the OPA series of duties and responsibilities. You can almost think of them as entry level OPAs or Program Analysts. They could be called Program/Operations Specialists.

At the AS1 level positions are developing procedures, systems, and forms necessary to complete work and ensure efficient flow of information, workflow, delivery of services within the agency and/or with other agencies, contractors, etc. They coordinate activities to ensure a smooth flow of services and operations which may include tracking, scheduling and delivery of services. They're responsible for coordinating the entire process on an agency-wide basis. They resolve problems through discussion and explanation of information.

At the AS2 level they're not so much focused on ensuring the Program or Operation is running smoothly, assisting people with signing up for benefits, checking applications, approving or denying benefits, etc. They're responsible for assisting the program/operations manager by doing work related to monitoring and/or auditing a program or operation, and administrative research, analysis, evaluation, interpretation for projects or studies related to a program area. Problems are resolved and compliance gained through negotiation. **NEGOTIATE:** "To arrange for or bring about consensus through conference, discussion, persuasion, and compromise." *The compromise piece implies that they have the authority to make a deviation to gain consensus.*

- They analyze and evaluate financial and statistical data and other information

related to the Program services or other situations. This analysis requires the need to interpret and apply the related laws, rules, regulations, etc. They use that analysis to determine and implement or authorize the appropriate course of action related to the issue.

- They are responsible for negotiating with stakeholders to resolve problems, gain compliance, reach a settlement, or determine provision of services. This negotiation would include the need to understand, interpret, and apply the related rules, laws, regulations, policies, etc. to the situation they're dealing with. This is where you see the separation from the AS1 and AS2. An AS1 might explain the Program policies, rules, regulations to someone so that that individual understands the services and what's necessary to apply for the benefits, or if they're even eligible for those benefits. The AS2 is negotiating with groups related to the Program (contractors, vendors, other agencies, municipalities, etc.) to solve problems or gain compliance to ensure the Program is meeting its goals.
- They're also analyzing information related to the Program services to determine an appropriate course of action. At this level there's a need for an understanding and interpretation of the relevant laws, rules, regulations so they know how to resolve the situation or negotiate. The need for interpretation of laws, rules, regulations isn't a duty, it's the byproduct of other work that requires the need for interpretation, such as analysis of information or situations to determine the best course of action, or to negotiate with others in various situations to gain their compliance. This is what is being referenced in the AS2 class spec, "the AS2 is distinguished from the AS1 by the responsibility for interpreting laws, rules, policies and procedures, and for applying those interpretations to specific situations some of which may be nonroutine." In the course of their responsibilities, the need for interpretation is necessary. Interpretation is not a duty by itself.

Both the AS1 and AS2 are focused on supporting the Program Analyst or OPA by ensuring the Program/Operation is running smoothly and doing what it's supposed to be doing or making recommendations based on their analysis and evaluation of the Program/Operation to improve it.

# Administrative Specialists and Program Analysts/OPAs



## Programs Side

Program Analysts

## Operations Side

Operations & Policy Analysts

Administrative Specialists

- Writing and explaining policies to carry out program/operation functions.
- Applying program/operation and general agency rules and regulations.
- Studying program/operation activities to ensure they are meeting standards.
- Evaluating program/operation results.

The Administrative Specialists, Program Analysts, and OPAs classifications form a continuum.

The basic type of work covered by these classes is similar, involving:

- Writing and explaining policies to carry out program/operation functions (which may be done through writing manuals, responding to inquiries, or providing training),
- Applying program/operation and general agency rules and regulations (both on a case-by-case or general basis),
- Studying program/operation activities to ensure they are meeting standards, and
- Evaluating program/operation results.

# What is a Program?



A program is an on-going agency function that has a clearly identifiable statutory and budget authority. Various factors determine if it's a program, such as:

- The direct provision of the program services vs. support of that activity,
- The degree to which the activity is discrete and can exist alone in the organization,
- Where and how the activity fits in the agency organizationally,
- The relationship of the activity to a basic mission of the agency,
- The statutory and budgetary basis for the activity, and
- The agency-wide nature of the activity.

The more the position directly provides a service that by statute and budget “stands alone”, is agency-wide and basic to the agency mission, the less likely there will be an issue about whether something is a program.

A program is an on-going agency function that has a clearly identifiable statutory and budget authority. When trying to figure out if the work is related to a Program, think about the various factors of what makes a program:

- The direct provision of the program services vs. support of that activity,
- The degree to which the activity is discrete and can exist alone in the organization,
- Where and how the activity fits in the agency organizationally,
- The relationship of the activity to a basic mission of the agency,
- The statutory and budgetary basis for the activity, and
- The agency-wide nature of the activity.

The more the position directly provides a service that by statute and budget “stands alone”, is agency-wide, and is basic to the mission of the agency, the less likely there will be an issue about whether something is a program.

# Program Analyst vs. OPAs



## Program Analyst

- Externally focused.
- Interacts directly with the public.
- Explains and applies program rules and regulations.
- Delivers program services and monitor the results.

## Operations & Policy Analysts

- Internally focused.
- Independently develops rules and policies.
- Consults and guides.
- Monitors results of other employees who provide program services to the public.

Looking at the Program Analysts and OPAs, you can see that the Program Analyst focus is external where the OPA is orientated internally.

The Program Analysts coordinates and administers one or more Oregon state Programs. They plan and administer program services to state residents, local agencies and governments, non-profit organizations, and tribal governments, or internal customers. The focus is external to the agency. They are the contact point between the agency and the program users. They explain the program, apply and interpret the Program's governing laws and rules, and monitor user activity for compliance. They also work to ensure that the program is successfully performing the purpose of why the program exists.

On the other hand, the primary focus of the OPA is providing consultative advice on the administrative, policy, programmatic and management aspects of agency's internal **operations**. For example, OPAs typically **do not** work with grants, they **do not** engage in partnerships or collaborate with interested parties, they **do not** design

features of a program or evaluate program and grant performance.

OPAs provide line managers with objectively based information for making decisions on the administrative, policy, programmatic, and management aspects of agency operations. They require a high degree of analytical skills, the skill to research problems and issues, and strong written and oral communication skills. Their focus is internal to the organization. They function within the agency to develop rules and policies, give technical guidance and consultation, and monitor program activity.

Both the Program Analyst series and OPA series are intended for positions that exercise analytical ability, professional judgment and discretion.

Positions doing work at the technical or assistant level should be classified in the general clerical, executive support specialist, administrative specialist, public service representative series, or at the technical level for the specific occupational grouping.

# Program Analyst vs. OPAs



## Program Analyst

- Program design and development
- Partnership and collaboration
- Legislative activities
- Grant/Fund management
- Program staffing
- Program representation
- Program services coordination
- Project management
- Dispute resolution

## Operations & Policy Analysts

- Management and program analysis
- Business systems analysis and improvement
- Policy and legislative analysis
- Administrative rule coordination and communication

The Program Analyst and the OPA are quite similar. Both the Program Analyst and OPA do legislative work and policy work. The difference is the OPA does it for internal management operations, while the Program Analyst does it for program delivery, program funding, program collaboration, program evaluation, and program compliance.

# Program Analyst and OPA Levels



- The nature of the work.
- Diverse, conflicting, and uncomplimentary programs, service provision, and controls.
- The impact on other activities in the program or the program itself.
- The extent to which the agency bases its public stand on the Program Analyst's recommendations.
- The extent to which the position's decisions obligate the agency's resources.
- Scope and effect.

The distinction between the levels is either representing diverse and uncomplimentary programs or a major conflicting role of service provision and control. When it comes to determining the level, we want to consider the scope and impact of the position's recommendations, decisions, and commitments:

- The nature of the work.
- Diverse, conflicting, and uncomplimentary programs, service provision, and controls.
- The impact on other activities in the program or the program itself
- The extent to which the agency bases its public stand on the Program Analyst's recommendations
- The extent to which the position's decisions obligate the agency's resources

When we look at "broad scope and effect," we want to consider it not just geographically, but also the breadth of program services the position manages (i.e., whether it's narrow or siloed, focusing on a specific area or function versus broad,

covering multiple program functions). For example, is the position impacting the entire program with all of its multiple services (broad), or is it managing a program within a program, such as the pass-through of funding to community program recipients related to the benefit or service of the program, such as medical services (narrow/siloed)?

# Program Analyst or OPA?



## Program Analyst

- Purpose directly related to the agency's mission.
- Position located within a core functional unit rather than an auxiliary support unit.
- Position established to provide services for an on-going agency function that has a clearly identifiable statutory and budget authority.
- Responsible *for the program*.

## Operations & Policy Analysts

- Purpose is in support of line operations that does not require specialized education in a particular discipline.
- Work is related to fields that may require a specialized education, but the state doesn't have a classification series for that occupation.
- Support of or contributing to the program or operation.

The key difference between these two classifications is that the OPA does **work in support of line programs or operations**. Whereas the Program Analyst is **responsible for the program**, usually work that is directly related to the agency's mission.

At times, positions classified as Program Analyst will do the same duties as positions classified as Operations & Policy Analyst; for example, policy development or legislative coordination.

To decide on the proper class series, consider the following factors:

- 1) Is the position purpose directly related to the agency's mission?
- 2) Is the position located within a core functional unit rather than an auxiliary support unit?
- 3) Was the position established to provide services for an on-going agency function that has a clearly identifiable statutory and budget authority?

If the answer to these questions is yes, then the position is most likely correctly

allocated to the Program Analyst.

For OPAs, they should be used when:

- 1) Work is in support of line operations that does not require specialized education in a particular discipline (for example, Natural Resources, Engineering, Information Systems, Public Health, Human Resources, Accounting, etc.).
- 2) Or the work is related to fields that may require a specialized education and the state does not have a classification series for that occupation.

## Program Analyst or OPA Summary



If the purpose of the position is ***in support of or contributing to*** the program or operations, the OPA is correct.

If the position is ***responsible for the program***, the Program Analyst is correct.

So, in summary, if the purpose of the position **is in support of or contributing to** the program or operation, the OPA is correct.

If the position is **responsible for the program**, the Program Analyst is correct.

# Overlap of Duties



When a position has duties that overlap between two different classification levels

- Duties, authorities, and responsibilities are not clearly defined.
- Additional review necessary.
- Form a clear picture of the type and level of the whole job.
- Do not focus on one duty or function.
- Consider redesigning the job either to restrict or expand the work to fit one level of the other.

Whenever a position seems to have significant elements of two classes, usually the duties, authorities, and responsibilities assigned to the position are not clearly defined. This would require additional review.

*Occasionally* a position will be found that, upon review, does have significant aspects of two levels. When this occurs, consider redesigning the job either to restrict or expand the activities to fit one level or the other. This is a cost-effective use of the chosen classification.

Keep in mind that the information about duties, authorities, and responsibilities in the classes are illustrative of the level of work. They are not position specific. To apply the specifications correctly, form a clear picture of the type and level of the whole job. Do not focus on one duty or function. You should also critically examine how the description of the same type of work changes between classifications.

# Resources



[DAS CnC Webpage](#)

[Program Analyst Job Family Guide](#)

[Agency Position Establishment Process](#)

[Management Decision Check List](#)

[Position Description Template \(updated 2023\)](#)

[FLSA Designation Worksheet](#)

[Classification Guide](#)

[Statewide HR Policies Page](#)

[Class Guide Glossary](#)

[Statewide CnC Meetings Page](#)

[Reclassification Considerations Guide](#)

[Operations & Policy Analyst Job Family Guide](#)

[OPA Spheres of Influence Reference](#)