

July 17, 2009

TO: Linda Fryant, Employee Relations Specialist  
Washington Public Employees Association

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

SUBJECT: Michelle Chavez v. Bellevue Community College (BCC)  
Allocation Review Request ALLO-09-007

On July 6, 2009, I conducted a Director's review telephone conference, concerning the allocation of Michelle Chavez's position. In addition to you and Ms. Chavez, Lucy Macneil, Special Assistant to the VP of Human Resources, participated on behalf of BCC.

### **Director's Determination**

This position review was based on the work performed for the six-month period prior to October 15, 2008, the date Ms. Chavez requested a position review at BCC. As the Director's designee, I carefully considered all of the documentation in the file, the exhibits presented during the Director's review conference, and the verbal comments provided by both parties. Based on my review and analysis of Ms. Chavez's assigned duties and responsibilities, I conclude her position should be reallocated to the Administrative Assistant 3 classification.

### **Background**

On October 15, 2008, Ms. Chavez submitted a Position Review Request to BCC's Human Resources Office, requesting that her Program Assistant position be reallocated to the Program Specialist 2 classification. Ms. Chavez's supervisor at the time, Administrative Services Manager Deborah Gruenfeld, and the Division Chair of Arts and Humanities, Thomas Nielsen, also signed the form. By email dated December 29, 2008, Ms. Macneil issued a decision reallocating Ms. Chavez's position to the Program Coordinator classification. Ms. Macneil did not believe the Program Specialist 2 was the appropriate fit. On January 28, 2009, the Department of Personnel received your letter on behalf of Ms. Chavez, requesting a Director's review of BCC's allocation determination.

### **Summary of Ms. Chavez's Perspective**

Ms. Chavez indicates her job changed when her previous supervisor retired in April 2008. Ms. Chavez asserts that she began performing tasks previously performed by her supervisor and continued to perform those duties when her new supervisor was hired in August 2008. In addition, Ms. Chavez states that her responsibilities increased with the addition of the Developmental Education and English Language Institute Departments to the Arts and Humanities Division. Ms. Chavez asserts she has the responsibility for developing and managing the quarterly schedule for the largest division on campus. Ms. Chavez explains that she develops and coordinates the schedules for five quarters, which she describes as a complex, ongoing process requiring extensive coordination with Department Chairs. Ms. Chavez asserts she also has responsibility for reviewing and processing Personnel Action Forms (PAFs) for part-time faculty in the division, which she tracks in conjunction with the quarterly schedule. Ms. Chavez states that her supervisor, Ms. Gruenfeld, does not have any responsibilities regarding the quarterly class schedule. Instead, Ms. Chavez contends she has the responsibility for coordinating and making decisions about schedule changes. Ms. Chavez also indicates she works directly with the Division Chair, Mr. Nielsen, regarding the quarterly schedule. Ms. Chavez believes she performs duties beyond the Program Coordinator level.

### **Summary of BCC's Reasoning**

BCC acknowledges the majority of work assigned to Ms. Chavez's position involves building the quarterly class schedule for the Arts and Humanities Division, which is the largest division on campus. BCC further acknowledges that Program Coordinators from other divisions rely on Ms. Chavez for guidance in managing the quarterly class schedule. BCC agrees that Ms. Chavez's position has responsibility for processing the PAFs for the division and recognizes that she works directly with the Division Chair for matters relating to the class schedule. BCC notes that building and modifying the schedule is a year round process and points out that planning for the next quarter occurs right after completing the current quarterly schedule. However, BCC does not believe the Program Specialist classification is the appropriate fit for Ms. Chavez's position. While BCC recognizes Ms. Chavez's position has been assigned a large scope of work and her position has a great deal of autonomy, BCC notes coordination of the quarterly schedule occurs in multiple offices across the college. BCC further notes that Program Specialist positions work in a very specialized area. As a result, BCC considered the Program Coordinator classification to be the best fit for Ms. Chavez's position.

### **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).

The Position Purpose described on the Position Review Request Form is summarized as follows (Exhibit A-4):

Ms. Chavez's position is responsible for developing and managing the quarterly schedule for the largest division on campus. This includes inputting, updating, and managing the schedule encompassing 36% of the college's classes. This responsibility involves coordinating with program chairs to staff classes within a tight deadline and notifying Arts & Humanities staff, other divisions and campus offices, as well as students of any schedule changes. This position builds and maintains divisional web pages, including course materials/syllabi archive pages. In addition, Ms. Chavez's position processes PAFs to pay part-time faculty and serve as the contact person regarding budget questions about the PAFs.

The Position Review Request Form emphasizes Ms. Chavez's sole responsibility for coordinating and managing the Arts & Humanities quarterly schedule, including 16 programs and departments, as well as the I-Best Program, which requires coordination with other divisions for item numbers. Further, Ms. Chavez's responsibility includes creating a spreadsheet in Excel to organize department classes for item numbers, staffing, meeting times and days, linked courses, clusters and room assignments. During the Director's review conference, Ms. Chavez pointed out this was one of the responsibilities performed by her former supervisor. Ms. Chavez's position is tasked with performing complex scheduling of classrooms using independent judgment for the needs of programs and departments. Based on the discussion during the Director's review conference, the complexity of scheduling also requires consideration of specialized student and/or faculty needs. The ongoing task of building and managing quarterly schedules is included in the majority of work assigned to Ms. Chavez's position (Exhibit A-4, page 4). The work includes collecting data and working with department chairs and includes coordinating IDS breakouts for linked courses with other divisions.

Besides managing the quarterly schedule, Ms. Chavez's position is tasked with processing PAFs and Special Assignment paperwork for faculty pay. This was also a task previously performed by her former supervisor. During the Director's review conference, both parties confirmed Ms. Chavez inputs specific information regarding classes assigned to a faculty member in the Student Management System. The information links with the Payroll System to create a report indicating the payment amount (Exhibit B-8-iii). Ms. Chavez obtains the report from the Office of Instruction and reviews it for accuracy. She also calculates the pay for certain class entries. Ms. Chavez explained that she tracks the faculty pay information on the Excel spreadsheet she creates as a tool for constructing the quarterly schedule (Exhibit B-8-ii).

In this case, there is no dispute that Ms. Chavez's supervisor, Ms. Gruenfeld, does not have any responsibility for the division's quarterly class schedule or that on a functional level, Ms. Chavez works directly with Mr. Nielsen, the Division Chair of Arts and Humanities. Mr. Nielsen reports to the Executive Dean of Instruction.

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.

The Class Series Concept for the **Program Specialist** classes includes the following:

Positions in this series coordinate discrete, specialized programs consisting of specific components and tasks that are unique to a particular subject and are separate and distinguished from the main body of an organization. Positions coordinate program services and resources; act as a program liaison and provide consultation to program participants and outside entities regarding functions of the program; interpret, review and apply program specific policies, procedures and regulations; assess program needs; and develop courses of action to carry out program activities. Program coordination also requires performance of tasks and application of knowledge unique to the program and not transferable or applicable to other areas of the organization.

The intent of the Program Specialist series is further clarified by considering the specialist definition in the Department of Personnel Glossary of terms for Classification, Compensation, & Management. The glossary provides that the duties of specialists ". . . involve intensive application of knowledge and skills in a specific segment of an occupational area."

<http://www.dop.wa.gov/CompClass/CompAndClassServices/Pages/HRProfessionalTools.as>

The Class Series Concept for the **Program Assistant and Program Coordinator** classes includes the following:

Perform work requiring knowledge and experience that is specific to a program. Organize and perform work related to program operations independent of the daily administrative office needs of the supervisor. Represent the program to clients, participants and/or members of the public.

Further, the Program Coordinator definition indicates that positions "coordinate the operation of a specialized or technical program." The distinguishing characteristics include the following:

Under general direction, perform work using knowledge and experience specific to the program. Exercise independent judgment in interpreting and applying rules and regulations. Independently advise students, staff, program participants

and/or the public regarding program content, policies, procedures and activities;  
select/recommend alternative courses of action and . . .

Have extensive involvement with students, staff, the public and/or agencies  
in carrying out program activities, and coordinate, schedule and monitor  
program activities to determine consistency with program goals.

The Program Specialist classes are not the best fit for Ms. Chavez's position because the schedule development, while a unique function, is a function performed for each academic program. In this case, Ms. Chavez has a greater scope of responsibility and more autonomy due to the size and complexity of the Arts and Humanities Division. Although the aspects of building the quarterly class schedule are unique, they do not involve the intensive application of knowledge and skills in a specific area, as identified in the definition of a specialist. While the duties assigned to Ms. Chavez's position fit within the Program Coordinator class, the scope and level of responsibility assigned to her position exceed this classification.

During the Director's review conference, Ms. Macneil indicated that she considered the Fiscal Specialist 1 and Administrative Assistant 3 classes (Exhibits C & D). Ms. Macneil noted that the primary focus of the **Fiscal Specialist 1** class involved financial management principals and therefore, was not the best fit for Ms. Chavez's position. I agree that the Fiscal Specialist 1 class is not the best fit. Ms. Macneil further noted that the definition of the Administrative Assistant 3 class did not coincide with the reporting relationship assigned to Ms. Chavez's position.

In Salsberry v. Washington State Parks and Recreation Commission, PRB Case No. R-ALLO-06-013 (2007), the Personnel Resources Board addressed the concept of best fit. The Board referenced Allegri v. Washington State University, PAB Case No. ALLO-96-0026 (1998), in which the Personnel Appeals Board noted that while the appellant's duties and responsibilities did not encompass the full breadth of the duties and responsibilities described by the classification to which his position was allocated, on a best fit basis, the classification best described the level, scope and diversity of the overall duties and responsibilities of his position.

The **Administrative Assistant 3** (AA 3) definition indicates that positions "perform varied administrative and secretarial support duties or positions are responsible for one or more major program activities under a second line supervisor."

Ms. Chavez is responsible for the major program activity of developing, coordinating, and managing the class schedule for the Arts and Humanities Division on a regular, ongoing basis. The level of autonomy in which she performs her duties and responsibilities fits the AA 3 level. While the organizational structure has her position reporting to Ms. Gruenfeld, on a functional level, she works directly with the Division Chair, a second line supervisor. He has the oversight of the majority of work performed by Ms. Chavez's position. This is consistent with the AA 3 distinguishing characteristic indicating the delegation of "one or more major program activities that would be performed under a . . . head of a major

organizational unit such as a school, college, or major academic . . . department." AA 3 typical work examples similar to Ms. Chavez's work include coordinating, organizing, and/or directing the operation of a major program activity, as well as serving as the primary contact in an assigned program area.

Overall, the majority of work and scope of responsibility assigned to Ms. Chavez's position best fits the Administrative Assistant 3 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 600 South Franklin, Olympia, Washington. The main telephone number is (360) 664-0388, and the fax number is (360) 753-0139.

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

c: Michelle Chavez  
Lucy Macneil, BCC  
Lisa Skriletz, DOP

Enclosure: List of Exhibits

## List of Exhibits

### A. Michelle Chavez Exhibits

1. WPEA cover letter January 28, 2009
2. Request for Director's Review form
3. Allocation determination letter dated December 29, 2008
4. Position Review Request form dated October 15, 2008

### B. Bellevue Community College Exhibits February 20, 2009: Requested Documentation considered during BCC allocation review.

1. Allocation determination letter dated December 29, 2008
2. Job account screen
3. Email from Michelle Chavez to Penni Blakely RE: My Position Review
4. Class Specification Program Coordinator (107N)
5. Class Specification Program Specialist 2 (107I)
6. Class Specification Program Assistant (107M)
7. Position Review Request dated October 15, 2008
8. Samples of Work
  - i. Examples of work and email correspondence
  - ii. Samples of paperwork used to build quarterly schedule
    - Examples of what department chairs submit
    - Example of spreadsheet developed from department chairs'
    - Report run from HP
    - Document submitted to Office of Instruction for processing and publishing.
  - iii. Samples of PAFs (first run & finals), special assignment paperwork.
  - iv. Performance evaluations (outside of timeframe)

### C. Class Specification Fiscal Specialist 1 (151E)

### D. Class Specification Administrative Assistant 3 (105G)