



STATE OF WASHINGTON
OFFICE OF THE STATE HUMAN RESOURCES DIRECTOR

DIRECTOR'S REVIEW PROGRAM
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March 15, 2012

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

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

SUBJECT: Cindy Boekhoff v. Bellevue Community College (BCC)
Allocation Review Request ALLO-11-030

Director's Determination

This position review was based on the work performed for the six-month period prior to March 23, 2011, the date BCC HR received Ms. Boekhoff's request for a position review. As the Director's Review Investigator, I carefully considered 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 Ms. Boekhoff's assigned duties and responsibilities, I conclude her position is properly allocated to the Administrative Assistant 3 classification.

Background

On March 23, 2011, Ms. Boekhoff submitted a Position Review Request (PRR) to BCC's Human Resources (HR) Office, requesting that her Administrative Assistant 3 position be reallocated to the Administrative Services Manager A classification (Exhibit B-1).

BCC notified Ms. Boekhoff on June 24, 2011 that her position was properly allocated to the Administrative Assistant 3 classification. Specifically, BCC determined the Administrative Assistant 3 classification accurately describes Ms. Boekhoff's responsibilities with respect to budget maintenance and monitoring, serving as a liaison to other campus departments and coordinating/scheduling meetings for staff and the traffic citation committee.

On July 22, 2011, the Department of Personnel received Ms. Boekhoff's request for a Director's review of BCC's allocation determination (Exhibit A-1).

This matter was originally scheduled for a Director's review telephone conference on November 10, 2011 rescheduled and conducted on January 10, 2012. Present during the meeting were Cindy

Boekhoff; Page Rebelo, WPEA Employee Relations Specialist; and Cesar Portillo, Vice President of Human Resources, BCC.

Following the review conference, the parties submitted additional information. BCC submitted a final rebuttal statement on January 27, 2012. This information has been added to the record and incorporated as exhibits 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. Little-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

Position are to be allocated to the class which best describes the majority of the work assignment. Ramos v DOP, PAB Case No. A85-18 (1985).

Duties and Responsibilities

Ms. Boekhoff performs a wide variety of office administrative tasks for the Director of Campus Operations who serves as the administrator of the Facilities Operations and Capital Projects Department. Approximately 75 staff work in Campus Operations across the following units: Maintenance Services, Custodial Services, Grounds, Warehouse/Hazardous Materials, Safety and Security, and Facilities, Planning & Construction (Exhibit A-4(2)).

In the PRR Ms. Boekhoff states her duties support the overall operation of Campus Operations in meeting established goals and objectives. She states that along with providing basic support, she works with and on behalf of the Executive Director in analyzing and developing budgets, establishing and a maintaining comprehensive fiscal record keeping system, and fiscal planning.

She also states she has responsibility for the coordination of the parking citation review committee which includes maintenance of the parking citation database and working on a variety of annual projects.

Ms. Boekhoff's duties and responsibilities are identified in the PRR as follows:

50% [Budget]

- Maintain and monitor large, complicated budgets, prepare and review budget requests, provide advice and information

30% [Traffic Committee]

- Manage the Traffic Citation Review Committee [TCRC] meetings and records
- Develop and implement processes for the TCRC
- Develop and maintain the traffic citation database
- Make recommendations to the VP of Administrative Services and

- Public Safety Director concerning policy and procedural changes
- Develop community service program for traffic citation appeals
- Schedule meetings with student, staff and faculty representatives for the TCRC
- Convene meetings and act as recorder for the TCRC
- Manage appeals in Access database and HP
- Notify appellants of court dates and decisions of TCRC
- Receive and submit second level appeals to Dean of Student Services and manage Access database and HP
- Work with the Director of Public Safety to resolve complaints

20% [Administration]

- Assist Executive Director of Campus Operations and keep apprised of daily operations, changes or developments
- Assist with maintaining the Executive Director's calendar, including planning and scheduling meetings, scheduling meeting rooms, audio/visual equipment and/or catering services
- Serve as a liaison between the Executive Director of Campus Operations and staff, transmitting assignments and requesting status
- Represents the Executive Director of Campus Operations and/or unit's goals and interests and coordinates related tasks
- Assist the Executive Director of Campus Operations and management staff in information gathering and decision making.

Mr. Laurel LaFever, Executive Director Campus Operations, did not complete or sign the supervisor's section of the PRR.

Summary of Ms. Boekhoff's Perspective

Ms. Boekhoff asserts she provides administrative services management support to the Executive Director of the Campus Operations Department. Ms. Boekhoff contends her duties include budget development and management, establishing and maintaining a comprehensive fiscal record keeping system, and fiscal planning. Further, Ms. Boekhoff states she has assumed additional responsibilities relative to managing the Traffic Citation Review Committee meetings and maintaining TCRC records.

Summary of BCC's Reasoning

BCC asserts Ms. Boekhoff's position does not rise to the level of administrative management responsibility required for allocation to the Administrative Services Manager class. BCC contends that while Ms. Boekhoff assists the Executive Director of Campus operations with administrative support, her position does not involve providing administrative management services as required. BCC asserts the Campus Operations Department is highly decentralized and each unit has its own manager or director who manages their own units including their budgets. BCC asserts that while Ms. Boekhoff assists unit managers in developing Power Point presentations or performing other administrative assistance for projects, this does not equate to management-level responsibility for project management. BCC asserts Ms. Boekhoff does not supervise staff or have administrative management responsibility on departmental personnel issues. BCC asserts each manager is responsible for managing staffing and other personnel-

related activities for their units and any involvement with Ms. Boekhoff regarding staffing issues is informational or procedural rather than managerial. BCC asserts Ms. Boekhoff's duties regarding the budget involve tracking and monitoring expenses as opposed to actual budget development.

BCC asserts the majority of Ms. Boekhoff's responsibilities, including maintaining and monitoring the departmental budget, serving as a liaison to other campus departments and scheduling meetings for staff and the traffic citation meeting fall accurately within the Administrative Assistant 3 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.

Comparison of Duties to Administrative Services Manager A

The Definition for this class states:

The Administrative Services Manager is responsible directly to the senior academic or administrative official for planning, organizing, implementing, coordinating and controlling all administrative services for a department, college, division, inter-disciplinary center, conglomerate organization or institution exercising independent judgment and decision-making authority.

The Distinguishing Characteristics for this class state:

An Administrative Services Manager performs, supervises, directs, provides counsel and assists the head of the organization and other personnel in a variety of management services. The primary purpose is to facilitate the administration of the organization.

These positions normally involve a wide variety of duties. The following services, or similar and closely-related activities, are normally included: project management, funds management, contract administration, management analysis, property management, space management, program and budget planning, public information, personnel administration and staff supervision.

Positions at the "A", "B", and "C" levels are distinguished by the variety of functions performed and the degree of authority and responsibility involved. Factors considered are: size of annual budgets, scope of departmental functions, kinds and volume of services rendered, complexity and diversity of functions, number of personnel for whom services are provided, extent of the manager's supervisory role and degree of involvement in activity calling for specialized or technical experience and capability, or a particularly high level of performance and the scope of delegated authority and responsibility for making independent

decisions that significantly influence the organization's objectives, programs, services and/or contractual commitments.

Positions at the "A" level are primarily responsible for a small organizational entity of a large university or college (e.g., total annual expenditures of the organizational entity: \$850,000 - \$1,700,000).

The Glossary of classification terms further defines "Administrative" and "Managerial" as follows:

Administrative – Determines or participates in making policy, formulates long-range objectives and programs, and reviews the implementation of programs for conformance to policies and objectives.

Managerial – Plans, coordinates, integrates, executes, controls and evaluates activities and functions of an organization. This includes developing budgets, policies and procedures, service delivery, and staff supervision.

The scope and level of Ms. Boekhoff's work does not meet the requirements of the definition and distinguishing characteristics of the Administrative Services Manager A classification.

Ms. Boekhoff's position does not have administrative level responsibility of determining or participating in making Campus Operations departmental policy, formulating long-range objectives and programs, or reviewing the implementation of programs for conformance to policies and objectives. Additionally, Ms. Boekhoff's position does not have management level responsibility. Mr. LaFever, Executive Director, retains authority within the Campus Operation Department for planning, coordinating, integrating, executing, controlling and evaluating activities and management level functions and services for the department. Additionally, the sub-unit Managers and Directors retain authority for budget development, policies and procedures, service delivery, and staff supervision for their units.

Ms. Boekhoff's position does not exercise authority over any of the following administrative services required for allocation to this class including: project management, funds management, contract administration, management analysis, property management, space management, program and budget planning, public information, personnel administration, or staff supervision. Ms. Boekhoff's position is most accurately described as providing and overseeing staff that provide administrative office support duties for an administrator who retains administrative management responsibility for the Campus Operations Department.

Ms. Boekhoff does not have project management responsibilities. Ms. Boekhoff was asked to provide assistance to the V.P. of Administrative services in preparing a power point presentation regarding capital projects which was used as part of a campus "Road Show" to notify BCC staff of capital construction projects on campus. This does not equate to having full administrative level responsibility for coordinating, directing, or managing departmental projects.

Ms. Boekhoff does not manage funds or contracts. Her responsibilities in this area align with performing higher-level administrative support tasks such as sorting through invoices and contracts for proper charges; reconciling expenditures with monthly budget status reports, handling purchase requisitions, and reconciling procurement card purchases.

Ms. Boekhoff does not have administrative management responsibilities relative to management analysis, space management, or public information. Ms. Boekhoff does not have responsibility for performing space and equipment analysis.

Ms. Boekhoff's property management responsibilities involve completing administrative support tasks such as contacting vendors and making arrangements for maintenance and repairs on campus. She also obtains outside services for repairs on campus for trades not employed by the college for safety or emergencies.

Ms. Boekhoff does not have responsibility for planning, developing or controlling the departmental budget, nor does she have the authority to make changes to the budget. While Ms. Boekhoff tracks and monitors expenditures, points out discrepancies, and may make recommendations, she does not develop budget estimates. Her duties include gathering and entering information into detailed spreadsheets and providing budget information to Mr. LaFever and the other managers and directors to assist them in making budget decisions. Ms. Boekhoff reviews and audits invoices to ensure correct billing. She tracks, monitors, audits and reports expenditures and discrepancies. When considering the overall assignment of work to Ms. Boekhoff's position, the bulk of her work relates to tracking and monitoring budget-related activities for Campus Operations, including the various sub-departments.

Ms. Boekhoff does not have responsibility for departmental personnel administration or staff supervision. Her position does not assist senior officials in the administration of proper personnel practices and procedures, and she has not been assigned supervisory responsibility over staff.

In summary, Ms. Boekhoff serves as the assistant to the Executive Director of the Campus Operations Department, Mr. Laurel LaFever. While she exercises a high level of responsibility and independence in performing a variety of office administrative tasks such as monitoring and tracking the budget and approving expenditures, her duties are best described as providing administrative support rather than providing administrative services management. Mr. LaFever retains overall responsibility and authority for the control of the department and the various programs and services that report to him.

Ms. Boekhoff's position's assigned responsibilities and level of supervision received do not reach the requirements for planning, organizing, implementing, coordinating and controlling all administrative services for a department as required by the Definition for the Administrative Services Manager A, B and C classes. The Administrative Services Manager series is not the best fit for the overall duties and responsibilities assigned to Ms. Boekhoff's position.

Comparison of Duties to Administrative Assistant 4

The Definition for this class state:

Positions serve as the assistant on administrative matters to the head of a state agency, the head of a major sub-division or major operating location of an agency, or to the chief administrator or head of a major organizational unit such as a school, college, or major academic/administrative department.

The Distinguishing Characteristics state:

Positions perform higher-level administrative duties of a substantive nature that are appropriate to be performed by the supervisor, manager, administrator, or professional level employee but have been delegated to the administrative assistant to perform. Positions in higher education may provide direct confidential secretarial support to a unit head or administrator. For general government positions, secretarial or clerical duties are incidental to the administrative functions performed.

For those positions in a major organizational unit such as a school, college, or major academic/administrative department, the "unit" will typically have more than 75 full-time equivalent professional and/or classified staff; OR service responsibility for more than 4,000 full-time students or staff, OR in the regional universities, college and community colleges, positions serve as the sole administrative support in an organization that has institution-wide responsibilities; OR positions serve as both sole administrative support and the executive secretary reporting to the organizational head. These positions are assigned to major units, with institution-wide responsibility, that have no assistant directors, deans or managers who would share the administrative duties of the position. [Emphasis added]

First, the level of managerial reporting relationship within the Campus Operations Department does not reach the requirements of the Distinguishing Characteristics of this class. While Campus Operations is a major administrative department with institution-wide responsibilities, it has assistant directors and managers who share in administering departmental functions. This limits Ms. Boekhoff's responsibility for serving as the assistant to Mr. LaFever on administrative matters for the department.

Secondly, Ms. Boekhoff does not serve as the assistant on administrative matters to Mr. LaFever at the level anticipated by this class. Although the Typical Work statements are not allocating factors, they do provide support to the scope and level of responsibility intended for the classification. As described in the typical work statements, Ms. Boekhoff does not develop budget estimates, assist in establishing annual financial goals or target dates, participate in establishing short and long-term fiscal plans and performance goals, prepare complex budget proposals, resolve contractual issues, or perform other administrative duties for Mr. LaFever at the level anticipated by this class.

For the reasons stated above, Ms. Boekhoff's position should not be allocated to the Administrative Assistant 4 class.

Comparison of Duties to Administrative Assistant 3

The Definition for the Administrative Assistant 3 class states:

Positions perform varied administrative and secretarial support duties or positions are responsible for one or more major program activities under a second line supervisor.

The Distinguishing Characteristics for this class states:

Positions are delegated higher-level administrative support duties or positions are delegated one or more major program activities that would be performed under a second-level professional supervisor, manager or administrator in WMS Band II or above or in exempt service, chief administrator, or head of a major organizational unit such as a school, college, or major academic or administrative department. Only one position will be allocated to an individual second-line supervisor for those positions performing one or more major program activities.

A major program activity is defined as a function that is a major element of the supervisor's job. The duty must stand alone and would create significant adverse consequences if poorly performed. However, full delegation can't occur if the supervisor's position requires specialized licensure such as attorneys, medical doctors, and engineers.

Higher-level administrative duties are duties of a substantive nature that are appropriate to be performed by the supervisor, manager, administrator, or professional level employee but have been delegated to the administrative assistant to perform. Areas may include but are not limited to, the following: budget development and/or management, expenditure control, office space management, equipment purchases, budget development and/or management, public relations, personnel administration, records management, and report preparation.

Incumbents in these positions represent the supervisor's and/or unit's goals and interests and provide interpretation or explanation of the supervisor's policies or viewpoints.

The overall scope and level of responsibility of Ms. Boekhoff's position, and the majority of her duties as a whole, closely matches the Definition and Distinguishing Characteristics of this class.

Ms. Boekhoff's time is spent performing budget work which includes monitoring and maintaining the departmental budget. This level of responsibility falls within the definition of this class of providing higher-level administrative support to the head of a major administrative department. Ms. Boekhoff tracks and monitors expenditures, points out discrepancies, and makes recommendations to departmental managerial staff to stay within the budget. Her duties include gathering and entering information into detailed spreadsheets and providing budget information and reports to Mr. LaFever and the other managers and directors to assist them in making budget decisions. Additionally, her level of decision making authority is consistent with this class such as modifying purchase orders within an allotted budget or making purchases with the departmental purchasing card.

Mr. Boekhoff represents Mr. LaFever's interests and provides interpretation or explanation of his policies or viewpoints to departmental directors and managers regarding administrative operations and/or procedures. She is the point of contact for the department when operational issues arise or an immediate response is needed regarding administrative processes and procedures. She coordinates activities and functions with the directors and managers. She assists Mr. LaFever in coordinating departmental events. However, Ms. Boekhoff requires her supervisor's approval to act for administrative issues of a substantive nature.

Additionally, Ms. Boekhoff's duties are consistent with the following typical work statements which identify the level of work performed in this classification:

- Establishes procedures and interprets and applies administrative policies to the work of the unit;
- Evaluates costs and/or approves purchases for expenditures such as equipment, supplies, and furniture; develops cost estimates for equipment needs, space renovations, and projects;
- Participates in budget preparation; develops budget estimates; monitors budget status and expenditures;
- Assists in devising unit standards/procedures to ensure adherence to policies regarding tasks such as budgeting, purchasing, and contract administration;
- Coordinates, organizes, and/or directs the operation of a program or major program activity;
- Represents management and serves as the primary contact in assigned program areas;
- Prepares reports, ...
- Coordinates with other departmental staff members on administrative practices and procedures;
- Serves as a liaison between supervisor and other staff; members, relaying assignments and requesting status information;

Ms. Boekhoff's other administrative duties, including working with Traffic Court on campus, tracking attendance and leave records, and taking minutes for meetings are consistent with these statements. During the review telephone conference, Ms. Boekhoff stated she assisted with the development of a better procedure for processing and paying bills for campus operations. She stated she set up a system for standardizing the process for showing and reporting invoices for payment.

When considering the overall assignment of work to Ms. Boekhoff's position, the bulk of her work relates to tracking and monitoring budget-related activities for Campus Operations, including the various sub-departments.

It is apparent that BCC clearly recognizes Ms. Boekhoff's work and her dedication to the college and the Campus Operations Department. However, a position's allocation is not based on an evaluation of performance but rather the majority of work assigned to a position. Therefore, the Administrative Assistant 3 classification best describes Ms. Boekhoff's position. Her 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.

You may file in person at 521 Capitol Way South, Olympia, Washington. Fax number (360) 586-4694.

For questions, please call (360) 664-0388.

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

c: Cindy Boekhoff, BCC
Page Rebelo, WPEA
Cesar Portillo, BCC
Lisa Skriletz, OSHRD

Enclosure: List of Exhibits

CINDY BOEKHOFF v BELLEVUE COLLEGE

ALLO-11-030

List of Exhibits

A. Cindy Boekhoff Exhibits

1. Director's Review request form for Cindy Boekhoff received by DOP on July 22, 2011.
2. A copy of an unsigned Position Description form for Campus Operations Administrative Assistant position.
3. A copy of the email from Jason Castro to Cindy Boekhoff dated June 24, 2011 providing the position review request allocation determination.
4. Cover letter from Page Rebelo, WPEA, dated August 29, 2011 enclosing the following exhibits with the listed pagination:

PAGE NO.	DESCRIPTION
1	Bellevue College organizational chart
2	Campus Operations organizational chart
3-5	Executive Director-Campus Operations position description
6-7	Director-Facilities Planning and Construction position description
8	Director- Public Safety position description
9-10	Assistant Director- Public Safety position description
11-12	Manager-Warehouse/Hazardous Materials position description
13-14	Manager-Grounds position description
15-16	Manager-Custodial Services position description
17-18	Administrative Assistant to the VP position description
19-22	Administrative Manager recruitment announcement
23-24	Administrative Services Manager position description
25-26	Administrative Assistant to the Dean of Information Resources position description
27-28	Administrative Services Manager-Continuing Education position description
29-30	Administrative Manager Social Science Division Instruction position description
31-32	Administrative Assistant to the Vice President of Equity and Pluralism

33-34	Administrative Assistant to the Vice President of Workforce Development
35-36	Administrative Assistant to the Vice President of Institutional Advancement
37-39	2009 Development and Performance Plan
40	Cindy Boekhoff title and working title
41-42	Administrative Assistant 4 class spec
43-45	Administrative Services Manager B class spec
46	July 1, 2010 email from Laurel LaFever re: remodel information
47	July 27, 2010 email from Laurel LaFever re: remodel update
48	List of Major Projects/past 3 years
49	List of Major Projects/upcoming 3 years
50-52	Budget and Project worksheets (3 oversized sheets)
53-54	Budget and Project worksheets
55-72	Expenditure approvals – Administrative Services and Capital
73-90	Inter-division emails
91-108	Reorganization proposals for Campus Operations
109-111	Art inventory

Additional Exhibits submitted after the review conference

5. Email from Page Rebelo to Kris Brophy dated January 17, 2012 with attached meeting minutes document titled, "Citation Review Committee."
6. Email from Page Rebelo to Kris Brophy dated January 17, 2012 with attached position description form titled, "Campus Operations Administrative Assistant Position Description."
7. Email from Page Rebelo to Kris Brophy dated January 17, 2012 with enclosed emails regarding "Road Show."
8. Email from Page Rebelo to Kris Brophy dated January 17, 2012 with enclosed emails regarding the "Road Show."
9. Email from Page Rebelo to Kris Brophy dated January 17, 2012 with enclosed email regarding "Road Show Review."
10. Email from Page Rebelo to Kris Brophy dated January 17, 2012 with enclosed email regarding "Road Show"
11. Email from Page Rebelo to Kris Brophy dated January 17, 2012 with enclosed email regarding "Road Show Strategy"
12. Email from Page Rebelo to Kris Brophy dated January 17, 2012 with enclosed email regarding Community Service with attached documents:

- a. Bellevue Community College Traffic Court Community Service Agreement,
- b. Traffic Citation Review Committee Community Service Criteria and Procedures.

13. Email from Page Rebelo to Kris Brophy dated January 17, 2012 with enclosed email regarding, "Traffic Court."

B. Bellevue College Exhibit cover letter dated August 16, 2011 with exhibits:

Cover letter from Cesar Portillo to Karen Wilcox enclosing the following attachments:

1. Position Review Request form for Cindy Boekhoff received by BCC HR on March 23, 2011 with attachments:
 - a. Position Description for Campus Operations Administrative Assistant
 - b. Organization Chart for Campus Operations Department
2. DOP Class specification for Administrative Assistant 3, 105G.
3. DOP Class specification for Administrative Services Manager A, 106E.
4. Allocation determination email from Jason Castro to Cindy Boekhoff dated June 24, 2011.
5. Copy of Campus Operations Organizational Chart (1 page)

Additional exhibits submitted after the review conference

6. Email from Cesar Portillo to Kris Brophy dated January 27, 2012 with enclosed final submittal response.