



STATE OF WASHINGTON

OFFICE OF FINANCIAL MANAGEMENT

STATE HUMAN RESOURCES DIVISION | DIRECTOR'S REVIEW PROGRAM

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November 29, 2017

TO: Connie Goff
Rules and Appeals Program Section Chief

FROM: Christa Biasi
Director Review Specialist

SUBJECT: Natalia Matkivska v. Bellevue College (BC)
Allocation Review Request ALLO-17-040

DIRECTOR'S DETERMINATION

This position review is based on the work performed for the six-month period prior to January 30, 2017, the date that BC Human Resources (BC HR) received Natalia Matkivska's Position Review Request (PRR, Exhibit B-2) requesting her position be allocated to Program Specialist 4 (PS) 4. As the Director's Review Specialist, I carefully considered all the exhibits. Based on my review and analysis of Ms. Matkivska's assigned job duties; I conclude her position is properly allocated to an Administrative Assistant (AA) 3.

BACKGROUND

On January 30, 2017, Ms. Matkivska's PRR was received by BC HR requesting her position be reallocated from a Program Specialist 2 to Program Specialist 4. (Exhibit B-2)

By letter dated June 23, 2017, Aaron Hilliard, Associate VP of Human Resources, notified Ms. Matkivska that her request to be allocated from PS 2 to PS 4 had been denied, but her position had been reallocated to Administrative Assistant 3. (Exhibit B-1)

On May 8, 2017, Office of Financial Management State Human Resources (OFM SHR) received Ms. Matkivska's request for a Director's Review of BC HR's allocation determination whereby she requested to be allocated to Program Specialist 4. (Exhibit A-1)

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).

ORGANIZATIONAL STRUCTURE

Ms. Matkivska's position is located within the Office of Instruction at Bellevue College and reports to the Director of Operations, Donna Sullivan.

POSITION OBJECTIVE

According to the PRR (Exhibit B-2), Ms. Matkivska states her position purpose is as follows:

My position exists to assist major components of the Office of Instructions to run effectively and efficiently. Those components are fiscal performance, agreements and degree development. To these ends, I first and foremost, manage and audit all fiscal performance relating to the division of Instruction. In doing so, I am tasked to use independent judgement and decision-making authority, investigate and resolve budget problems and collaborate with Human Resources, Budget, Payroll and Purchasing. I also serve as a fiscal liaison to the five academic divisions as well as to the Academic Success Center, Library Media Center and RISE. This means that I am responsible for monitoring multiple budgets in excess of \$4 million, advising higher-level administrative staff regarding fiscal performance. This means further that I manage the database and budgetary systems, develop budgets estimates, handle analysis, tracking and reconciliation, accounts payable and receivable, adjunct faculty contracts, special assignment contracts and stipends, expense reimbursements, purchasing and procurement card reconciliation and reporting.

Second, I work with both internal and external representatives and agencies to coordinate licenses, grants, contracts and agreements.

Third, I provide direct, complex administrative support and confidential duties for the Director of Operations and Director of Baccalaureate Development. I also provide shared administrative support for the Vice President of Instruction and Associate Deans. I take a proactive role and exercise independent judgement to provide customer service, maintain the work environment, manage records and ensure the smooth and efficient operation of the division.

In the performance of these duties, I impact the mission and work of the academic divisions, new and ongoing academic initiatives and new degree development. This work also influences college's efforts with the State Board of Community and Technical Colleges including its various Instructional Councils.

Duties and Responsibilities Position Review Request (PRR, Exhibit B-2)

Ms. Matkivska states in her PRR that she spends approximately 40% of her time serving as budget specialist for the Division of Instruction, providing complex analysis of multiple budgets with multiple funding sources and managing and coordinating all fiscal processes for the division.

Ms. Matkivska outlines in her PRR she spends another 40% of her duties providing complex administrative support to the Director of Baccalaureate Development.

SUMMARY OF MS. MATKIVSKA'S PERSPECTIVE

Request for a Director's Review (Exhibit A-1)

In her Request for Director's Review, Ms. Matkivska stated "My responsibilities and specialized tasks match the description of Program Specialist 4 in two important areas. I have organization-wide program management responsibilities over the campus-wide budget for the Office of Instruction. In addition, under the direction of the Associate Dean for Program Development and Innovation, I independently perform research, document creation and coordination of workflow for new certificates and degrees." She continued by stating her budget work includes analysis and reconciliation of budget for academic divisions such as Social Sciences, Institution for Business and Technology (IBIT), Health Sciences, Education and Wellness Institute, Arts and Humanities and Humanities and Sciences. She also researches, edits and prepares documents for presentations.

Ms. Matkivska stated she administers, oversees and directs all activities for the Office of Instruction. Some of these duties include, but are not limited to, develop and maintain the computerized information system to track and monitor 22 budgets, generate budget requests, reconciliation, produce reports, analyze budget trends, etc. All of the duties she states are performed under the general direction of her supervisor.

She further stated she supports the Associate Dean of Program Development and Innovation by providing and coordinating program activities that affect the development of new certificates and degrees for the College. Ms. Matkivska outlined her supportive administrative duties as:

- research, data collection and analysis to plan development and implementation of new programs. (This research and data collection was evident in the production of the Digital Marketing statement of need and program proposal as well as for the creation of a manual for new degree development and a new LEAN workflow chart)
- development of new program budgets
- coordination and scheduling with internal and external individuals such as faculty and staff from other colleges or the SBCTC (State Board for Community and Technical Colleges) and BC's curriculum advisory committee
- coordination of the annual Washington State Applied Baccalaureate Conference...

Ms. Matkivska also provided a detailed breakdown of her budget and fiscal responsibilities (Exhibit A-3), her support to the Baccalaureate Development Program responsibilities and her administrative responsibilities. Although this information is not detailed within this determination, it has been taken under consideration in its entirety.

SUMMARY OF BC HR'S PERSPECTIVE

Classification Analysis Report (Exhibit B-1)

Alicia Tarigan, Human Resource Generalist prepared a memorandum to Aaron Hilliard, Vice President. Ms. Tarigan explained she compared Ms. Matkivska's duties to the PS 2, AA 3 and 4 classes. Ms. Tarigan outlined Ms. Matkivska's duties and stated:

The incumbent provides administrative support to the Director of Operations by scheduling meetings/appointments, full planning of events, maintaining directory

information and organizational charts, preparing certain correspondences, researching and preparing draft reports and procedures, make travel arrangements/registrations and reimbursements for those traveling on behalf of Instruction, and communicating on behalf of the Director on certain matters. Other tasks relating to the operation of Instruction and of the main office include co-management of SharePoint website for Instruction, front desk support (answer telephone, greet and direct visitors, answer questions), receive and distribute mail in the main office, receive and distribute/track documents requiring signature approval, arrange for maintenance service, order supplies and equipment for the office, handle confidential and sensitive information in and out of the office, and manage records according to retention schedule.

Ms. Tarigan also outlined information obtained during the desk audit that includes assisting in the faculty hiring process. Her involvement includes running reports from the personnel system and financial system to determine vacancies. Ms. Tarigan also outlined that Ms. Matkivska also performs needed research and assigns budget line to each position. While these are not all of the duties outlined in the Classification Analysis Report, all information on the duties performed has been taken under consideration.

Furthermore, Ms. Tarigan outlined the Class Series Concept for the Program Specialist Series and the definition for the PS 4 (the requested class). Ms. Tarigan stated, "When considering the incumbent's overall assignment of work, the bulk relates to performing administrative support and higher-level administrative fiscal tasks for the operation of the division and the office." Ms. Tarigan continued by stating the majority of Ms. Matkivska's duties and responsibilities are administrative support work and the majority of tasks are transferrable or applicable to other areas of the college. Because of these findings, Ms. Tarigan stated Ms. Matkivska's duties do not meet the Class Series Concept of the PS series and recommended her position be reclassified to the AA series.

Ms. Tarigan compared Ms. Matkivska's duties to the AA 3 class and stated, "The majority of the incumbent's responsibilities appear to meet the allocating criteria of this class..." She continued by outlining the incumbent's responsibility and duties are to perform a variety of administrative tasks and "the incumbent's responsibility to track and monitor the performance of all twenty-two (22) budget lines is a major activity for the unit, and would create significant adverse consequences if poorly performed." Ms. Matkivska has been delegated duties by the Director of Operation and she also provides front desk support.

Ms. Tarigan determined Ms. Matkivska's duties did not reach the level of the AA 4 because while she does perform some support duties for the Vice President of Instruction who is the head of a major organizational unit at BC, the majority of her duties are in support of the Director of Operations, the Director of Applied Baccalaureate Development, and office operations. She further explained that each academic area within the Office of Instruction has its own Dean, who in turn receives administrative assistance for their own Director of Operations or administrative assistant.

COMPARISON OF DUTIES TO CLASS SPECIFICATIONS

I carefully reviewed the exhibits submitted by the Parties. Allocating criteria consists of the class specification's class series concept (if one exists), the definition and the distinguishing

characteristics.¹ Typical work is not an allocating criterion, but may be used to better understand the definition or distinguishing characteristics. It is also important to note that the allocation or misallocation of another position is not within the scope of this review and therefore cannot be taken under consideration.

In this matter, the initial request from Ms. Matkivska was that her position be reallocated from a Program Specialist 2 to Program Specialist 4. Similar to BC, it must first be determined if the duties being performed by Ms. Matkivska fit within the Program Specialist series. The *Glossary of Classification Terms* defines a program as, "A specialized area with specific complex components and tasks that distinguish it from other programs (or the main body of an organization). A program is specific to a particular subject and has a specific mission, goals and objectives...." The Office of Instruction ensures the college programs are operating correctly, are fully staffed and meeting educational standards. Within the Office of Instruction, the Director of Operations and Director of Baccalaureate Development perform their duties. The Office of Instruction also oversees the Arts and Humanities department, HESWI Department, Science Department, Social Science department, Undergraduate Research and Institute for Business and Information Technology. All of these departments are educational in nature. The Office of Instruction is not separate from the main body of the institution.

Furthermore, Bellevue College is a higher education institution whose mission is to be "student-centered comprehensive and innovative college... The college promotes student success by providing high-quality, flexible, accessible educational programs and services..." Strategic Goal 1.2 states, "Forge leadership and participation in new initiatives, certificates, and degrees that meet the needs of the region such as expanded baccalaureate programs," which supports the purpose of the Office of Instruction to ensure the various departments are offering student centered educational programs. Both statements speak to instruction given to students for the betterment of lives and their community. Therefore, the Office of Instruction does not have specific mission and goals that, again, are distinguishable from the main goals of the institution.

Even more to the point, the *Glossary of Classification Terms* continues to define a program further by stating, "Duties are not of a general support nature transferable from one program to another. Performance of clerical duties is in support of an incumbent's performance of specialized tasks. Independent performance of these duties usually requires at least a six-month training period." The duties performed by Ms. Matkivska are transferrable from one program to another. For example, she serves as the budget specialist for the division of instruction, and provides complex analysis of multiple funding sources. This task would be true for all departments within BC. She utilizes HP 3000 to perform some her duties which other departments also utilize, she tracks and coordinate licensure, makes recommendations, etc. All of these duties are transferrable. The interpretation of polices within the Office of Instruction is similar throughout the college. Furthermore, Ms. Matkivska's duties are not being performed in relation to a specific subject matter, clients or subject. Instruction is the business of the college and therefore, it is not separate and cannot be considered a program. Therefore her duties are considered general support and transferrable from one program to another.

¹ In *Norton-Nader v. Western Washington University*, PRB Case No. R-ALLO-08-020 (2008), the Personnel Resources Board (Board) stated that the following standards are the hierarchy of primary considerations in allocating positions: a) Category concept (if one exists); b) Definition or basic function of the class; c) Distinguishing characteristics of a class; and d) Class series concept, definition/basic function, and distinguishing characteristics of other classes in the series in question.

Furthermore, because Ms. Matkivska was allocated as a PS 2, it is necessary to look to the class even though it has been established Ms. Matkivska does not meet the class series concept or the definition of program as outlined in the *Glossary of Classification Terms*. In order for Ms. Matkivska to be allocated to the PS 2 class, she would need to "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." It has already been established the first allocating criteria for the PS 2 is not separate and distinguishable from the main body of the program. She would need to coordinate program services and resources, monitoring the budgets is not coordinating services and resources and she does not provide consultation to program participants, etc. Therefore, I agree with both BC HR and Ms. Matkivska that the duties performed by Ms. Matkivska do not meet the PS 2 class.

Ms. Matkivska, in her request for review indicated she believed her duties met the PS 4 class. Although, it has already been established Ms. Matkivska's duties are not being performed in a "program" as defined by the *Glossary of Classification Terms* and Class Series Concept, but because she requested reallocation to PS 4, it is important to outline her duties also do not meet the definition of the class. The first qualifier of the PS 4 definition is "Positions at this level work under administrative direction, and have organization-wide program management responsibilities, and are recognized as program specialists." By Ms. Matkivska's own statement, she does not perform her duties under administrative direction, see Exhibit A-2, page 2, where Ms. Matkivska states, "To these ends, under general supervision..." and outlines her duties. The performance of duties under "general direction" is significantly different than "administrative direction." In order for Ms. Matkivska to perform her duties under administrative direction she must work independently within the scope of context of rules, regulations and objectives. She would independently plan, design and carry out programs, projects and studies, exercise independent decision-making authority for determining work objective and goals, etc. However, in her request for reallocation, Ms. Matkivska states she collaborates, supports, act as, all of which meet the definition of general direction which is defined as:

- Employee independently performs all assignments using knowledge of established policies and work objectives.
- Employee plans and organizes the work and assists in determining priorities and deadlines. May deviate from standard work methods, guidelines or procedures in order to meet work objectives.
- Employee exercises independent decision-making authority and discretion to decide which work methods to use, tasks to perform and procedures to follow to meet work objectives.
- Completed work is reviewed for effectiveness in producing expected results.

Therefore, Ms. Matkivska does not meet the first qualifier for the PS 4. More to the point, Ms. Matkivska's duties do not have state-wide impact, she does not administer, oversee, and direct **all** program activities and advise public entities and higher level administrative staff on the program components. Based on the foregoing, I do not believe allocating Ms. Matkivska's position within the Program Specialist Series and more importantly to the PS 4 is appropriate. She does not coordinate the operation of a specialized program. While she does monitor budget status of various departments, she does not make public presentations, monitor program activities in relation to established goals, etc. Because of these determinations I must look to other classes outside the Program Specialist Series. Based on my analysis of the duties

performed by Ms. Matkivska and her level of responsibility, I find her duties align with the Administrative Assistant duties as set forth below.

Administrative Assistant 3

Definition

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

Distinguishing Characteristics

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.

As stated in *Norton-Nader v. Western Washington University*, PRB Case No. R-ALLO-08-020 (2008), the PRB set out the hierarchy for position allocations. The first allocating criteria is the Category Concept (Class Series Concept). In this matter the AA series does not have a class series concept. I therefore begin my analysis with the definition of the AA 3 class.

The duties performed by Ms. Matkivska are administrative and secretarial support duties. Throughout her exhibits, Ms. Matkivska provides information related to her administrative duties. She acts as the point of contact for all instruction related budget questions, she utilizes HP 3000 and other databases to track unit expenditures. She conducts research and collects data for analyzes and advising higher level staff, she reviews fiscal reports and uses independent judgment to coordinate and resolve resource conflicts related to budgets and fiscal processes.

In her own Exhibit A-3, Ms. Matkivska outlines her budget, fiscal, administrative and secretarial duties. For example, she prepares and maintains database that tracks expenditures by division, she analyzes trends to make sure all allocated funds are balanced. Although, Ms. Matkivska states her duties related to the databases are acting as a point of contact for all program related budget questions, the preparation and maintenance of a database or analyzation and tracking trends are not acting as a point of contact, rather these administrative functions in support of the Office of Instruction.

Furthermore, Ms. Matkivska's duties also meet the distinguishing characteristics of the AA 3 in that the duties she performs are higher-level administrative duties of a substantive nature and are appropriate to be performed by her supervisor. The Director of Operations stated, "for the past year, she has not needed to do anything relating to budget beyond providing final approval and sign documents because the incumbent has been delegated the responsibility to work out all details prior to obtaining approval..." Because Ms. Matkivska outlines that 60% of her duties are related to monitoring the performance of 22 budget lines, she also meets the distinguishing characteristics of performing higher-level administrative duties of a substantive nature.

Based on the foregoing information and after careful review of the information contained in the file, I have determined the primary function of Ms. Matkivska's position and the majority of her duties in their entirety fall within the scope and level of responsibility stated in the Definition and Distinguishing Characteristics for the Administrative Assistant 3 class. I further agree the organizational structure in the Office of Instruction does not support allocation to the AA 4 class. Therefore, her overall level and scope of assigned duties and responsibilities are consistent with Administrative Assistant 3 level work.

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 PO Box 40911, Olympia, Washington, 98504-0911. The PRB Office is located on the 3rd floor of the Raad Building, 128 10th Avenue SW, Olympia, Washington. The main telephone number is (360) 407-4101 and the fax number is (360) 586-4694.

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

c: Natalia Matkivska, Appellant
Aaron Hilliard, VP of Human Resources

Enclosure: List of Exhibits

Nataliya Matkivska v Bellevue College
ALLO-17-040

LIST OF EXHIBITS

A. Nataliya Matkivska Exhibits

1. Nataliya Matkivska's Request for Director's Review
2. Statement
3. Breakdown of Responsibilities
4. BAS in Digital Marketing Prospectus
5. Applied Baccalaureate Conference
6. Active Faculty Spreadsheet
7. Workflow Chart
8. ACCT national survey
9. Financial Analysis of BC's twelve Baccalaureate programs

B. Bellevue College Exhibits

1. Allocation determination letter and Classification Analysis Report by Alicia Tarigan, HR Generalist
2. Employee's request: Position Review Request form
3. Signed and dated Supervisor Review Section of PRR
4. Org Chart
5. Other documents considered during the review
6. List of classification specifications considered
7. Other documents relevant to the review

C. Class Specifications

1. Program Specialist 2
2. Program Specialist 4
3. Administrative Assistant 3