

February 27, 2007

RE: Cindy Boekhoff v. Bellevue Community College
Director's Review Request HEU No. 4598

Dear Ms. Boekhoff,

On October 17, 2006, I conducted a Director's review meeting at the Department of Personnel, 2828 Capitol Boulevard, Olympia, Washington, concerning the allocation of your position. You attended the Director's review meeting in person, and Human Resources Vice President, Lucy Macneil joined the meeting by telephone conference call.

Background

On May 20, 2005, you submitted a Position Review Request Form B to the Human Resources Office at Bellevue Community College. On July 5, 2005, Penni Blakely, the Director of Human Resource Operations, emailed you her decision that you were properly allocated to the Administrative Assistant A classification. After reviewing your request, Ms. Blakely determined you did not meet the criteria for the Administrative Services Manager A classification because you do not have management responsibility for a department or unit; rather, you provide support for an administrator who has that management authority.

On July 27, 2005, you submitted a Director's review request with attachments to the Department of Personnel (DOP). After filing your request with DOP, you completed DOP's Position Review Request form, signed October 28, 2005. Your supervisor reviewed the form and completed the supervisor's portion, signed November 28, 2005. DOP received the additional information on December 7, 2005; however, the descriptions on the Position Review Request form were reflective of the duties performed when you submitted your original request in May 2005.

The following summarizes your perspective as well as your employer's:

Summary of Ms. Boekhoff's Perspective

Ms. Boekhoff asserts the primary purpose of her position is to facilitate the administration of Campus Operations. As such, Ms. Boekhoff contends that her duties include program and budget planning and states her budgetary responsibility is quite extensive. As an example, Ms. Boekhoff states the 2004-05 budget expenditures increased by 32.4% in 2005-06 to the amount of \$5,613,063 (Attachment to Exhibit E-5). Additionally, Ms. Boekhoff asserts she monitors other budgets within Campus Operations, such as parking and transportation budgets. Due to the complexity, Ms. Boekhoff asserts she uses advanced computer skills to create in-depth spreadsheets to track expenditures. As part of the internal process, Ms. Boekhoff states she reviews purchase orders and invoices, assigns codes, and transfers data to a spreadsheet to manage budget information. Ms. Boekhoff states she has a credit card in her name for purchases and payments and that she authorizes payments such as the Verizon bill. Ms. Boekhoff also states she works with vendors and evaluates the best way to use funds in order to save the College money.

While Ms. Boekhoff acknowledges she does not have signature authority, she describes her budget responsibilities as complex and asserts she determines which budget codes are assigned to each expense for numerous departments. Ms. Boekhoff contends the information she tracks and incorporates into spreadsheets serves as a useful tool for the Campus Operations Director and assists him in making budgetary decisions. In addition, Ms. Boekhoff asserts she responds to students, staff, and administrators and handles daily issues that arise in Campus Operations, ranging from special arrangements for a classroom to ordering windows or paint or addressing air quality problems. Ms. Boekhoff states she makes decisions based on past policy and practice and acts on behalf of the Campus Operations Director in his absence. Therefore, Ms. Boekhoff believes she meets the definition and responsibilities of the Administrative Services Manager A classification.

Summary of Bellevue Community College's (BCC's) Reasoning

BCC acknowledges that Ms. Boekhoff is an invaluable asset to the Campus Operations Program. BCC also recognizes Ms. Boekhoff's advanced computer skills and ability to create detailed spreadsheets to assist her in tracking a variety of expenditures for a number of departments. While Ms. Boekhoff's abilities enable her to perform excellent work in support of her Director, BCC contends it is the Campus Director who has the ultimate management authority, including signature authority and budgetary responsibility. BCC describes the work Ms. Boekhoff performs as transferring data, tracking expenses, assigning pre-established codes to various expenses, and matching and reconciling purchase orders with invoices or billing statements.

BCC acknowledges that Ms. Boekhoff has a procurement card (credit card) for paying routine bills, like the Verizon account, but states she has limited authority and does not make decisions about which accounts to contract with. Similarly, BCC contends Ms. Boekhoff checks and verifies the information she processes and assures the correct

budget numbers are assigned but asserts she does not have the authority to make budget decisions. BCC states Ms. Boekhoff does an excellent job of carefully tracking and breaking down budget information but characterizes her work as very high-level administrative support. BCC further states that Ms. Boekhoff's computer knowledge and recommendations for handling expenses more efficiently are very helpful but also indicative of administrative support skills. As such, BCC contends Ms. Boekhoff is appropriately allocated to the Administrative Assistant A classification.

Director's Determination

This position review was based on the work performed for the six-month period prior to May 20, 2005, as documented on the Position Review Request, Form B, and the subsequent Position Review Request form signed by you in October 2005 and your supervisor in November 2005. As the Director's designee, I carefully considered all of the documentation in the file, including your July 27, 2005 Director's review request with attachments, the additional exhibits presented during the Director's review meeting, and the verbal comments provided by both parties. Based on my review and analysis of your assigned duties and responsibilities, I conclude your position is properly allocated to the Administrative Assistant A classification.

Rationale for Determination

In reviewing your Position Review Request Form B (Exhibit E-4), you state that your position's primary purpose is to facilitate the administration of the organization. You also list duties that include program and budget planning, contract management, and personnel administration. On the subsequent Position Review Request Form (Exhibit E-6), you also reference budget development and management, expenditure control, general administration and office management. However, the position purpose also notes you "[p]rovide administrative support to the Director of Campus Operations" in managing those functions.

A review of your job duties identified as 60% include the following:

- Sorts through various invoices . . . for proper budget charges.
- Budget expenditures entered on a multi-page complex Excel spreadsheet.
- Budgets are monitored and reconciled monthly with budget status reports.
- Purchase requisitions and card reconciliation.
- Processes and reconciles motorpool with budget transfer to various departments.

During the Director's review meeting, you also discussed how you develop complex spreadsheets in Excel and explained how you track and monitor the various budget information for Campus Operations, Custodial Grounds, Maintenance, Public Safety, Utilities, and Transportation. While there is no doubt the detailed breakdown of expenditures and recommendations you provide to your Director are extremely helpful,

the duties described above are consistent with those of a very efficient administrative assistant.

In the same section of duties, you also state that you manage the functions for each of the seven budgets. However, in the attached supervisor review, your Director characterizes your responsibilities in those areas as "recording expenditures and recording keeping, but not making budgetary decisions on how the funds are to be expended." He also describes payroll as "processing of time sheets as prepared by supervisors . . ." Your Director further describes your decision-making authority as being limited to responses to department services within the administrative assistant position.

When comparing the above duties to the Administrative Assistant A classification, they are consistent with the class series concept, distinguishing characteristics, and examples of work. For example, the class series concept states, "[p]rovide support to the chief administrator or head of a major organization unit such as [an] . . . administrative department . . ." and includes expenditure control, office management, personnel administration, records management and/or report preparation. The series concept also notes that positions do not have management responsibility; rather, they provide "support for an administrator who has ultimate management responsibility."

The distinguishing characteristics for the Administrative Assistant A further describe the following components, which are also consistent with your assigned duties and responsibilities:

- Delegated decision making authority is exercised in areas such as expenditure control, planning and management of . . . equipment purchases . . .
- Develop budget estimates, establish and ensure adherence to procedures for budget maintenance, authorize expenditures . . .
- Represent the administrator/head within the campus community and provide interpretation or explanation of supervisor's policies or viewpoints. . . .

Finally, similar examples of typical work listed for an Administrative Assistant A include evaluating costs for the unit; preparing reports, budgets, or contracts; attending meetings as the administrator's representative; developing budget estimates, monitoring and controlling budget status and expenditures; and assisting in devising unit standards/procedures to ensure adherence to institutional or funding agency policies regarding tasks such as budgeting, purchasing and contract administration. All of these examples of work tie into your duties and responsibilities of monitoring expenditures through the use of your spreadsheets and making recommendations and suggestions to make your department operate more efficiently.

Your duties and responsibilities do not align with the Administrative Services Manager A classification because while you do assist and provide information to your Director, you are not responsible for planning, implementing, and controlling all administrative services for Campus Operations. Rather, your Director has the responsibility for implementing policies, approving expenditures, and making budgetary decisions.

It is evident from the examples of your work that you provide excellent support to the Director of Campus Operations and that you are a valuable asset to the organization and play a critical role in ensuring operations run smoothly. A position review, however, is limited to a comparison of assigned duties and responsibilities to the available job classifications. As a result, the Administrative Assistant A classification best describes your position.

I understand this has been a lengthy process, and my analysis reflects the time period prior to May 20, 2005. Therefore, if you believe your duties have changed or expanded since that time, you may request a review of your current duties and responsibilities in accordance with BCC's reallocation procedure.

Appeal Rights

WAC 357-49-018 provides that either party may appeal the results of the Director's review to the Personnel Resources Board (board) by filing written exceptions to the Director's determination in accordance with Chapter 357-52 WAC.

WAC 357-52-015 states that an appeal must be received in writing at the office of the board within thirty (30) calendar days after service of the Director's determination. The address for the Personnel Resources Board is 2828 Capitol Blvd., P.O. Box 40911, Olympia, Washington, 98504-0911.

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

Sincerely,

Teresa Parsons
Director's Review Supervisor
Legal Affairs Division

c: Lucy Macneil, BCC
Lisa Skriletz, DOP

Enclosure: List of Exhibits