



**STATE OF WASHINGTON  
OFFICE OF FINANCIAL MANAGEMENT**

STATE HUMAN RESOURCES DIVISION | DIRECTOR'S REVIEW PROGRAM  
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June 2, 2016

**TO:** Kristie Wilson  
Acting State HR Rules and Policy Manager

**FROM:** Kris Brophy  
Director's Review Specialist

**SUBJECT:** Tamara (Tami) Walsh v. Pierce College (Pierce)  
Allocation Review Request ALLO-15-101

**Director's Determination**

This position review was based on the work performed for the six-month period prior to October 1, 2015, the date Pierce Human Resources (Pierce HR) received the request for a position review. As the Director's Review Specialist, I carefully considered all of the documentation in the file, the exhibits and the verbal comments provided by both Parties. Based on my review and analysis of Ms. Walsh's assigned duties and responsibilities, I conclude her position is properly allocated to the Credentials Evaluator 3 (CE 3) classification.

**Background**

On October 1, 2015, Pierce HR received Ms. Walsh's Position Review Request (PRR) form asking that her position be reallocated to the Program Specialist 2 (PS 2) class or Program Specialist 3 (PS 3) class. (Exhibit B-2)

On November 30, 2015, Pierce HR notified Ms. Walsh that her position was properly allocated as a CE 3. (Exhibit B-1)

On December 22, 2015, Office of Financial Management – State Human Resources received Ms. Walsh's request for a Director's review of Pierce's allocation determination. (Exhibit A-1)

On May 17, 2016, I conducted a Director's review telephone conference. Present for the conference were Tami Walsh; Steve Sloniker, Staff Representative, WPEA; Amy Zurfluh, Human Resource Consultant (HRC), Pierce; Sarah Crane, HRC, Pierce; and Gena Merrigan, HRC, Pierce.

## **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. Walsh's position is assigned to the District Evaluations Office. This office is part of the Admissions unit located within the Enrollment Services and Financial Aid department on the Pierce College main campus. Her position provides primary credentials evaluation support to the Pierce College District. Ms. Walsh reports to Maggie Segesser, Program Support Supervisor 2, who in turn reports to Ann White, Dean of Enrollment Services and Financial Aid.

## **Duties and Responsibilities**

Ms. Walsh is responsible for determining the status of degree and certificate completion for students. She has primary responsibility for conducting preliminary and graduation evaluations for students attending Pierce District who are enrolled in specialized programs including: Dental Hygiene, Veterinary Technology, Nursing, Computer Network Engineering, Construction Management, Criminal Justice, International Programs, Early Childhood Education, Social Service Mental Health, Health Informatics and Integrated Technology, High School Completion and High School 21+ Completion.

Ms. Walsh conducts comprehensive reviews and audits of student course records and other information to determine whether or not a student is on track to complete or has completed their desired program of study prior to admission or degree or certificate conferral.

In the position review request (PRR) submitted for reallocation, Ms. Walsh describes her duties as follows (Exhibit B-2):

### **35% Duty:**

Responsible for preliminary and graduation evaluations for students attending Pierce College district wide who are enrolled in specific special unique programs, to include Dental Hygiene, Veterinary Technology, Nursing, Computer Network Engineering, Construction Management, Criminal Justice, International Programs, Early Childhood Education, Social Service Mental Health, Health Informatics and Integrated Technology, High School Completion, High School 21+ Completion.

I perform these evaluations to include international transcripts, military training, transferred-in credits, Advanced Placement, CLEP Exams, DANTES Exams, Articulations Credits, Prior Learning Credits and ICRC Guidelines. Foster collaborative relationships to enhance student degree completion, their learning and success. Collaborate with Program Support Supervisor II, our department and other units within the Dean of Enrollment Services umbrella to execute and improve the performance and accuracy of the District Evaluations Office. Enter student transfer credits and degrees to official Pierce College academic records and insure accuracy of recorded information as this is the college's permanent official record.

25% **Duty:**

Provide information and technical assistance to special program participants as well as their advisors and staff representatives regarding program content, policies, procedures, and recommend alternative courses of action when needed. Confer regularly with program faculty advisors and their staff regarding the interpretation and implementation of program policies, and participants. Monitor program courses within the special programs within the established program parameters and determine variances from the program standards. Suggest alternative courses of action to be taken when students and/or faculty or program coordinators are unable to complete the program as set forth on the printed curriculums.

20% **Duty:**

Work with other office staff members to answer their questions regarding policies, procedures in processing preliminary and graduation evaluations. Train and assist all departmental staff and answer their questions regarding their job assignments. Provide assistance and counseling and/or instruction as needed to Program Support Supervisor II, two Program Coordinator positions and two part-time Office Assistant positions as well as many outside staff and faculty members. Main point of contact for academic and faculty advisors regarding evaluations questions with regards to equivalencies, policies and procedures.

Advise students, staff, faculty and public regarding program content and policies for degree requirements. Recommend alternative courses of action to assist students in meeting degree requirements and insuring a smooth transition for transfer students. Analyze program operations, policies and procedures and provide instruction as needed. Maintain an up-to-date manual on evaluation policies and procedures. Create and maintain manuals and document updates and changes that affect curriculum and appropriate application of course transfer.

Serve as counsel to the curriculum advisors and Program Specialist 2 - Academic Advisor positions at Fort Steilacoom, Puyallup and the military sites in determining course equivalencies as well as interpreting policies and procedures of Pierce College. Serve as the staff representative on Prior Learning Assessment committee to review and award academic credit based on professional occupational crosswalks. Collaborate with the Dean of Enrollment Services and other departments to implement and maintain a policy to support portfolio assessment for prior learning.

10% **Duty:**

Independently determine course equivalencies for math and English transfer courses and data-entry into SMS to allow students the ability to register electronically. I use independent judgment to determine equivalencies of all courses transferred in electronically from other community colleges within the State of Washington. This enables all community college course work to be reflected in the degree audit program which is an essential tool for advising and evaluations. Responsible for the determination of equivalencies and updating CLEP/DANTES examination equivalencies and disseminating the information district wide.

5% **Duty:**

Enter program codes for new, deleted and changed programs offered at Pierce College. Work with the SMS (Student Management System) and other computer applications to include but not limited to Word and Excel to correspond with students, staff and public. Also use these programs to put together the yearly graduation program.

3% **Duty:**

Serve on committees representing the Evaluations Office. Serving on the Graduation Committee-establishing dates to have names provided for mailings, commencement program and other publications. Provide eligible names to outside agencies inquiring about our commencement ceremony. Work at the ceremony to set up and clean up. Serve on state-wide Prior Learning Assessment Committee - participate in forming guidelines and practices to follow in the awarding of prior learning for students from military and other various technical backgrounds.

2% **Duty:**

Other duties as required.

### **Supervisor's Comments**

Ms. Segesser completed the Supervisor Portion of the PRR (Exhibit B-3). She indicates that Ms. Walsh's description of her assigned duties and responsibilities is accurate and complete.

She provides the following comments regarding Ms. Walsh's duties:

Tami Walsh is the lead staff member that Navigators and Faculty Program Coordinators contact with questions and for clarifying information regarding programs, degrees and certificates. She reviews the work completed by Program Specialists and exempt staff at Pierce College @ JBLM prior to awarding the student their degree and/or certificate.

Tami monitors the degree completion of 9 professional technical programs and 3 different student populations by analyzing the participants courses work and program requirements; she has lead and directed other staff members to include 2 PT staff members. Tami has volunteered to be the lead classified staff person involved in Prior Learning Assessment to help the Evaluations Office team stay up-to-date on the information coming out and is currently working on mapping out military course equivalences for faculty review for the military course conversion.

I believe in her main job duties and tasks description, it should be annotated that it is outside of her job class where she has been entering program codes for new, deleted and changed programs offered at Pierce College.

Ms. Segesser indicates Ms. Walsh's decision-making authority includes the following:

- She works together with the Vice President of Workforce, Economic and Professional Development and the Dean of Enrollment Services in establishing new degree and certificate coding for the District's inventory and update codes to meet state requirements.
- She works together with the Registration and Records Supervisor and the Research Analyst on the institution's exit coding as well as the clean-up of codes for the ctcLink conversion.
- Specialized program coordinators consult with Ms. Walsh regarding course substitutions and guidelines.
- She independently approves drafted and created office correspondence for staff to use for student notification.

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

The argument presented by Ms. Walsh is summarized as follows:

- She serves as the primary liaison throughout the district regarding the College's degree policies, practices and procedures.

- She advises PS 2 advisors from the military sites, curriculum advisors, Program Navigators (PS 3) and faculty program directors for specialized programs on a daily basis.
- She provides training to all of the specialized program departments in addition to evaluating credits from other sources as well as using the Student Management System, and maintaining FERPA Guidelines.
- She serves as the primary staff contact for the Prior Learning Assessment program, working directly with faculty and the Division Deans and Vice Presidents to establish policies and procedures on the awarding of this type of credit.
- She is working to build a curriculum crosswalk for the awarding of military credits for veteran students.
- She facilitates the process of awarding high school diploma programs, all specialized programs at Pierce that require prior admissions requirements, as well as other specialized programs with intricate detailed requirements. The faculty program directors she works with rely on her to guide them through the evaluation process from the time a student enters their programs to completion.
- She is responsible for establishing deadlines for graduation application deadlines as well as organizing and editing the graduation commencement program.

### **Summary of Pierce's Perspective**

The argument presented by Pierce is summarized as follows:

- The work she performs does not meet the class series concept and the definition of the Program Specialist series because the Evaluations function is considered an integral part of Pierce and is not considered a specialized area with specific complex components and discrete tasks that distinguish it from the main body of the organization.
- She spends a majority of her time determining the status of preliminary and degree completion. This evaluations portion of her work aligns fully with the CE 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 Program Specialist 2 (PS 2)**

**The Class Series Concept for this class states:**

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.

Examples of program areas may include, but are not limited to: business enterprises, fund raising, volunteer services, community resources, election administration and certification, juvenile delinquency prevention, recreational education and safety, energy education, aeronautic operations and safety, student housing, financial aid, and registration.

**The Definition for this class states:**

Positions at this level work under general supervision and plan, organize, direct and coordinate operations for programs such as the business enterprise, volunteer services and community resources, elections examination/administration programs. Incumbents oversee day-to-day program operations, function as the program representative and resource, have extensive contact with program participants and outside entities, and resolve problems within a delegated area of authority. Unusual problems, probable outcomes and solutions are presented to higher levels for resolution. Incumbents may be delegated limited authority to approve budget expenditures and may assist higher-level staff with developing and coordinating statewide program activities.

There are no Distinguishing Characteristics for this class.

Ms. Walsh's position duties do not fully encompass the scope and level of responsibility required for allocation to the PS 2 class.

For example, the Admissions unit provides a variety of district level admissions, credential's evaluation and other related student services administrative support to academic departments. The Credentials Evaluation office is one of the student services functions performed within the Administration unit as part of the Enrollment Services Department. However, the student credentials evaluation function does not constitute a fully separate program with specialized functions and discrete activities which separates it fully from main body of the Enrollment Services and Financial Aid Department. As a whole, the overall scope of this function does not reach the organizational size and scope of program operations anticipated by this class.

In addition, as stated in the Definition, positions at this level have independent responsibility for planning, organizing, directing and coordinating all operations for a specialized program. Incumbents coordinate services and resources, assess program needs and develop courses of action to carry out program specific functions and activities. While a portion of Ms. Walsh's duties reach aspects of this level of work, her position does not fully meet this level of responsibility. Rather, Ms. Walsh's position has primary responsibility for performing complex credentials evaluation work regarding specialized student academic programs across the Pierce District.

While Ms. Walsh supports student success activities, her position does not have the depth or breadth of responsibility for establishing standards and implementing courses of action to carry out program functions at the level anticipated by this class. Ms. Walsh is supportive to these efforts and provides input to her supervisor and other management staff regarding the credentials evaluation function; however, responsibility for the overall coordination and implementation of this function rests with her supervisor, Ms. Segesser.

Further, positions at this level act as the program's primary representative and resource. They serve as a liaison and provide consultation to program participants and outside entities regarding the functions and content of the program. Incumbents contact program participants and outside entities extensively and resolve problems.

Ms. Walsh advises students, faculty, staff and the public regarding policies and procedures concerning degree requirements, but does not consult and resolve problems with outside entities at the level anticipated by this class. The focus of her position and the majority of her duties as a whole are more technical in nature, consisting of providing direct technical support regarding degree requirements and conducting complex preliminary and graduation evaluations for students.

Allocation to the "Program" series requires an assignment of work that is unique and specific to a particular program but not work that is specifically described by another existing class specification. If there is a class that encompasses the body of work, allocation to the specific class must take primary consideration. Allocation to a "Program" class should only occur when there are no other viable options for allocation. While a portion of her work does involve performing specialized work in support of the College's credentials evaluation function, the thrust of her position and the majority of work as a whole are specific to credentials evaluation. Thus, there is a class which specifically addresses the specific function of her position and body of work that is under review in this appeal. Since there is a class which specifically describes the scope of work and specific duties performed by Ms. Walsh, allocating her position to a class within the Program series is not appropriate. For this reason, Ms. Walsh's position should not be allocated to the PS 2 class.

This is further supported by Personnel Resources Board (PRB) decisions in which the Board has concluded that while one class appeared to cover the scope of a position, there was another classification that not only encompassed the scope of the position, but specifically encompassed the unique functions performed. In *Alvarez v. Olympic College*, PRB No. R-ALLO-08-013 (2008), the Board held that "[w]hen there is a definition that specifically includes a particular assignment and there is a general classification that has a definition which could also apply to the position, the position will be allocated to the class that specifically includes the position. [See *Mikitik v Depts. of Wildlife and Personnel*, PAB No. A88-021 (1989)."

For each of these reasons, Ms. Walsh's position should not be allocated to PS 2 class, or other classes within the Program Specialist series.

### **Comparison of Duties to Credentials Evaluator 3 (CE 3)**

#### **The Definition for this class states:**

Positions have responsibility for reviewing, analyzing and evaluating applicants for general or vocational teaching and administrative certificates, and approving or denying applicants' credentials; or have responsibility for evaluating a wide variety of education credentials for academic programs.

#### **The Distinguishing Characteristics for this class state:**

Positions work under general direction and evaluate a wide variety of education credentials for academic programs, or evaluate applicants for general or vocational teaching and administrative certificates. Positions regularly assign, instruct and check the work of others or perform complex credentials evaluations work such as evaluating military documentation of test/training and international credentials.

Positions have responsibility for approving or denying student admission and/or graduation, or issuance of teaching/administrative certificates.

Ms. Walsh's position closely matches the Definition and Distinguishing Characteristics of CE 3 class.

For example, Ms. Walsh's position specializes in the degree conferral evaluation process for specialized education programs at Pierce College. The focus of her position involves determining the status of degree completion for students. She conducts comprehensive reviews and audits of student course records prior to degree conferral. She performs complex credential evaluation work including evaluating military documentation for conversion. Her position also has primary responsibility for approving or denying student admission and/or graduation. This meets the Definition's statement for having responsibility, "for evaluating a wide variety of education credentials for academic programs" and "approving or denying applicants' credentials."

Ms. Walsh also spends time coordinating the Evaluation Office's timelines and making sure all processes are conducted in a timely manner such as deadlines for degree application, updating of application files, clearing of application files, diploma printing, graduation ceremony deadlines and timelines that affect the Department. In addition, the work she performs requires the use of her specialized knowledge of the college's degree programs to perform her other administrative processing functions which aligns with the credentialing function. Therefore, the focus of her position and the majority of her duties as a whole meet the primary allocating requirements of this class.

Although the Typical Work examples do not form the basis for an allocation, they lend support to the work envisioned within a classification. The following statements indicate the level of work assigned to the CE 3 class specification and are represented of the overall duties of Ms. Walsh's position:

Assigns, instructs, and checks the work of staff;

Determines applicant's level of education; determines accreditation of institution attended; interprets grades awarded on a wide variety of grading scales;

Provides consultation for departments, students, other institutions, and the public on a variety of matters concerning...academic programs;

Reviews and analyzes education and experience of applicants for general or vocational teaching and administrative certificates to determine eligibility; approves or denies issuance of certificate;

Answers correspondence with educational and vocational institutions and individuals regarding evaluations and requests for information on certification requirements;

Ms. Walsh's position duties are fully consistent with these statements. For example, she advises Military and Curriculum Advisors, Program Navigators and Faculty Program directors on a daily basis.

She serves as the primary staff contact for the Prior Learning Assessment Program, working directly with faculty and the Division Deans and Vice Presidents to establish policies and procedures on the awarding of this type of credit.

She facilitates the process of awarding high school diploma programs, all specialized programs at Pierce College that require prior admissions requirements, as well as other specialized programs with intricate detailed requirements. The Faculty Program Directors she works with rely on her to guide them through the evaluation process from the time a student enters the program to completion.

When determining the appropriate classification for a specific position, the duties and responsibilities of that position must be considered in their entirety and the position must be allocated to the classification that provides the best fit overall for the majority of the position's duties and responsibilities. *Dudley v. Dept. of Labor and Industries*, PRB Case No. R-ALLO-07-007 (2007).

Based on the information provided, the primary focus of Ms. Walsh's position is to comprehensively review and audit student course records and other information. Her position specializes in the degree conferral evaluation process for specialized education programs at Pierce.

In summary, it is acknowledged that a portion of Ms. Walsh's work reaches aspects of the work performed by the PS 2 class. For example, Ms. Walsh uses specialized credentials evaluation knowledge to perform her job. Her position requires detailed knowledge of each of the college's specialized degree programs. She provides clarification of evaluation policies and requirements to the District's campuses, and provides technical assistance to students, faculty and staff. She serves as the primary staff contact for the Prior Learning Assessment program, she works directly with faculty and the Division Deans and Vice Presidents to establish policies and procedures, works to build a curriculum crosswalk for the awarding of military credits for veteran students, establishes deadlines for graduation application deadlines as well as organizing and editing the graduation commencement program.

While aspects of Ms. Walsh's work relates to performing programmatic support tasks, the majority and focus of her work and level of responsibility more fully align with credentials evaluation work and are best described by the CE 3 classification. Ms. Walsh's 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 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: Tami Walsh  
Steve Sloniker, WPEA  
Amy Zurfluh, Pierce

Enclosure: List of Exhibits

**TAMERA WALSH v PEIRCE COLLEGE**

**ALLO-15-101**

**LIST OF EXHIBITS**

A. Tamera Walsh Exhibits

1. Request for Director's Review from Tamera Walsh (pages 1-2)
2. Letter of Request for Review submitted by Tamera Walsh (pages 3-4)
3. Allocation Request Review documentation by Tamera Walsh (pages 5-6)
4. Position Review Request submitted by Tamera Walsh to Pierce College Human Resources 10-01-15 (pages 7-13)
5. Position Review Request Supervisor Portion submitted by Maggie Segesser (pages 14-15)
6. Notes from Position Review Interview conducted by Amy Zurfluh on 11/18/15 (pages 16-21)
7. Classification Specifications for Program Specialist 2 (page 22)
8. Classification Specifications for Program Specialist 3 (page 23)
9. Classification Specifications for Credentials Evaluator 3 (page 24)
10. Memorandum of Allocation Determination from Amy Zurfluh (pages 25-30)

B. Pierce Exhibits

1. Allocation determination letter and analysis from Holly Gorski and Amy Zurfluh dated November 30, 2015
2. Position Review Request submitted by Tamera Walsh October 1, 2015
3. PRR supervisor portion submitted by Maggie Segesser
4. Notes from Position Review Interview by Amy Zurfluh on November 18, 2015
5. Program Specialist 2 classification specification
6. Program Specialist 3 classification specification
7. Credentials Evaluator 3 classification specification

C. State HR Class Specifications

1. Program Specialist 2
2. Program Specialist 3
3. Credentials Evaluator 3