



STATE OF WASHINGTON
OFFICE OF THE STATE HUMAN RESOURCES DIRECTOR

DIRECTOR'S REVIEW PROGRAM
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November 30, 2011

TO: Page Rebelo, Employee Relations Specialist
Washington Public Employment Association (WPEA)

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

SUBJECT: Mary Cox v. Bellevue College (BC)
Allocation Review Request ALLO-11-023

On October 24, 2011, I conducted a Director's review telephone conference regarding the allocation of Mary Cox's position. In addition to you and Ms. Cox, Penni Blakely, Director, Human Resource Operations, participated on behalf of Bellevue College.

Director's Determination

This position review was based on the work performed for the six-month period prior to February 25, 2011, the date BC's Human Resources (HR) Office received Ms. Cox's request for a position review. As the Director's designee, I carefully considered all of the documentation in the file, the exhibits presented during the Director's review conference, and the verbal comments provided by both parties. Based on my review and analysis of Ms. Cox's assigned duties and responsibilities, I conclude her position is properly allocated to the Printing & Duplication Specialist 2 classification.

Background

On February 25, 2011, BC's HR Office received Ms. Cox's Position Review Request (PRR), asking that her Printing & Duplication Specialist 2 (P&DS 2) position be reallocated to the Printing & Duplication Specialist 3 (P&DS 3) classification. The form was completed by Ms. Cox's supervisor, Joe LaMonte, Duplicating & Printing Production Manager, and it was considered a management-initiated reallocation request. Ms. Cox signed the PRR and agreed the description of duties was accurate and complete (Exhibit B-1). However, during the Director's review conference, Ms. Cox clarified that she did not believe the P&DS 3 was the best fit for her position's duties and responsibilities. Instead, Ms. Cox considered the Printing Stockroom Worker classification a better fit for her position.

On April 11, 2011, HR Retention Specialist Jason Castro spoke with Ms. Cox about her position's duties. He also reviewed her position description and comments from her supervisor, Mr. LaMonte, and Bev Lucas, Printing Services Manager. On April 25, 2011, Mr. Castro determined Ms. Cox's position was correctly allocated to the P&DS 2 classification (Exhibit B-6).

On May 25, 2011, the Department of Personnel received Ms. Cox's request for a Director's review of BC's allocation determination.

Summary of Ms. Cox's Perspective

Ms. Cox asserts the P&DS 2 class does not properly represent the nature of the work she performs. She believes her duties cutting paper for use in the copy center; unloading stocks from delivery trucks for storage and delivery; and wrapping, boxing, and shipping all products from the bindery to the college and outside sources better fit within the Printing Stockroom Worker job class. In addition, Ms. Cox contends the duties assigned to her position differ from the duties assigned to the other P&DS 2 position working in the copy center running high-speed copiers. Ms. Cox states the other position does not have responsibility for maintaining, repairing, or troubleshooting bindery equipment.

Ms. Cox states that although there has not been a need for her position to supervise work students, she has the ability to perform that function if necessary. She further asserts the former press operator position allocated to the P&DS 3 class had not supervised others. Ms. Cox believes her duties and overall level of responsibility exceed the P&DS 2 classification, and she asserts her supervisor agrees her position should be reallocated (Exhibit A-5-a).

Summary of BC's Reasoning

BC asserts Ms. Cox's position performs journey level technical tasks of operating duplicating or bindery machines, as well as performing repairs to the machinery. BC contends these duties best fit the P&DS class series. BC further asserts Ms. Cox's position has not been assigned lead responsibilities to regularly assign, instruct, and check the work of others. As a result, BC contends Ms. Cox's position is correctly allocated to the P&DS 2 classification.

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).

Duties and Responsibilities

In summary, the purpose of Ms. Cox's position includes responsibility for bindery work; delivery of materials to division offices and the bookstore; maintaining all equipment, calling for service when needed; and maintaining stock supplies for bindery and printing. Bindery duties include

folding, cutting, envelope inserting, coil binding, laminating, and scoring (putting a seam on card stock so it can be folded) (Exhibit B-1).

The Bellevue College Printing and Duplication Specialist 2 position description further describes the position as a "fully-qualified technician performing journey level technical tasks" and functioning independently (Exhibit B-2). Ms. Cox's position reports directly to the Printing Services Manager of Duplication and Print Production (Joe LaMonte). Mr. LaMonte reports to the Printing Services Manager (Bev Lucas) (Exhibit B-3).

The specific duties and majority of work, as described on the PRR (65%) include the following (Exhibit B-1):

- Coil binding
- Folding
- Cutting
- Shrink wrapping
- Envelope inserting for mailing
- Preparing jobs for shipping through campus mail (includes boxing and wrapping as noted in the position's purpose on PRR)
- Preparing and scheduling jobs for off campus shipping
- Delivering student course modules for sale in bookstore
- Cutting parent sheets for printing on high-speed printers [cutting larger sheets down to smaller sizes]
- Ordering supplies and maintaining inventory
- Training and supervising student help as needed.

Other duties include delivery of extra student course modules or expedited materials to the bookstore (10%); special jobs such as poster mounting, trimming, attaching grommets (15%); and the operation of a new envelope press, which began in October 2010 (10%).

In addition, both Ms. Lucas and Mr. LaMonte provided BC's HR Office with a copy of Ms. Cox's job description, identified above as the Bellevue College Printing and Duplication Specialist 2 position description (Exhibits B-2-c and B-7). The subsequent position description submitted by Mr. LaMonte includes changes to the core competencies. However, the typical duties listed on both versions are the same. The typical duties further describe the work identified on the PRR as follows:

- Scheduling jobs involves reviewing workload and meeting customer deadlines;
- Operating high-speed copy and bindery equipment includes set up functions, as well as cleaning machines, making minor repairs and adjustments, and scheduling maintenance and services calls as needed;
- Completing jobs includes accurately calculating the billing for each job and preparing all printed materials for shipping, pick-up, or delivery;
- Duties include receiving materials and stocking paper and supplies as needed.

In an email to HR as part of BC's position review, Mr. LaMonte clarified Ms. Cox's position mainly involves bindery work with back up as a copy operator, and he noted that she has taken on duties that include operating the envelope press (Exhibit B-2-b). During the Director's review conference, Ms. Cox explained that she maintains and orders all supplies for the machines she operates, and that she calls for service on the machines as needed. However, she indicated that she performs regular maintenance, such as removing and cleaning lamination roles in the oversized laminator; changing the blades, oiling, and maintaining the large format cutter; changing the drum and toner in the envelope press; and maintaining a folding machine. Ms. Cox indicated that the offset press no longer exists and stated that her position has sole responsibility for running the bindery functions. Ms. Cox agreed her position has not had an occasion to lead student workers because she has been able to handle the volume of work. However, she stated that she occasionally leads co-workers when helping her with bindery work or projects.

During the Director's review conference, Ms. Cox also emphasized the delivery functions of her job. She provided examples of shipping and receiving duties that include performing deliveries of modules to all division offices and the bookstore during each quarter. She noted that she loads boxes onto a cart and makes a delivery twice a day. She also prepares packages for delivery using internal campus mail and tracks the items in a written ledger. Besides the campus deliveries, Ms. Cox indicated Printing Services handles all printing jobs for Cascadia College, and she boxes, wraps, and prepares materials for pick up by Pilot, an outside courier. Ms. Cox explained that she obtains a purchase order, completes a form, and then calls Pilot to schedule the pickup. In addition, Ms. Cox indicated that she accepts deliveries from Printex, and she labels and ships the products to various locations on campus.

Although Mr. LaMonte requested reallocation of Ms. Cox's position to the P&DS 3 job class, Ms. Cox believes the Printing Stockroom Worker job class better describes her position's duties and responsibilities. As a follow-up to the Director's review conference, I asked both parties to provide comments about how Ms. Cox's duties compare with the Printing Stockroom Worker job class.

In summary, on behalf of Ms. Cox, you indicated that several of the duties identified in the Printing Stockroom Worker job class fit within the duties described as 65% of Ms. Cox's work time, such as taking inventory of stocks and ordering supplies; accepting delivery of Printex products; cutting paper stock, trimming and cutting finished press work; gathering, folding, stapling and padding printed materials; wrapping, boxing, and tying supplies for shipment around campus and to another college; and maintaining shipping and receiving records (Exhibit C-2).

BC acknowledged Ms. Cox performs the above duties. However, BC noted that she orders supplies for the pressroom only and does not perform all deliveries for Printing Services. In addition, BC noted the Printing Stockroom Worker job class does not include Ms. Cox's duties to operate high-speed duplicating or bindery equipment, make minor repairs, clean equipment, or schedule service for the machines. Therefore, BC felt the P&DS 2 job class more accurately described Ms. Cox's overall position (Exhibit C-1).

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.

The **Printing Stockroom Worker** definition states that positions “[d]irect and participate in the assembling and receipt of material and maintain records pertaining to shipments and receipts in a printing stockroom.”

While examples of typical work identified in a class specification do not form the basis for an allocation, they lend support to the work envisioned within a classification. The **Printing Stockroom Worker** typical work examples include the following:

- Take inventory of stocks and order replacements; fill orders from other departments for blank paper and other stock items; unload stacks from delivery trucks for storage;
- Cut paper stock for use in the pressroom and trim and cut finished press work;
- Gather and supervise the gathering, folding, stapling, and padding of printed material;
- Wrap, box, and tie supplies for shipping; prepare bills of lading; attach postage and bills of lading and maintain shipping and receiving records.

Although a component of Ms. Cox's job involves performing some of the functions listed above, the primary focus of this class, as described in the definition, encompasses the performance of shipping and receiving functions for a printing stockroom.

I realize Ms. Cox accepts items from Printex, prepares materials for delivery and distribution throughout the college campus, and schedules a pickup with a courier to deliver to another college. I also acknowledge there is some overlap between the tasks identified in the Printing Stockroom Worker and P&DS job classes. However, the examples in the Printing Stockroom Worker class specification describe a more in-depth shipping and receiving operation that involves monitoring inventory and ordering materials used in production, unloading trucks, preparing bills of lading, and maintaining records of those related documents. By contrast, Ms. Cox's position has responsibility for ordering supplies related to the machines she operates. In addition, a key component of her position involves operating and maintaining bindery equipment to produce a finished product rather than focusing solely on assembly and distribution of materials housed in a printing stockroom.

I also reviewed the class series concept for the **Stockroom Attendant** class series, which reads as follows:

Operating forklifts and other similar heavy duty material-handling machines is not a typical duty. Receives, issues, and/or maintains an inventory of all materials, including those located off-site, owned by a state institution or facility using a manual or automated inventory system.

The primary focus of this class series encompasses functions related to inventory. Again, a component of Ms. Cox's duties fits within this concept; however, the primary focus of her position does not involve performing inventory functions.

Although there may be some overlap between job classes, the Personnel Resources Board (PRB) has previously held the following:

Most positions within the civil service system occasionally perform duties that appear in more than one classification. However, 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).

Neither of the above classes provides the best fit for the overall duties and responsibilities of Ms. Cox's position.

The **Printing and Duplication Specialist 3** (P&DS 3) definition reads as follows:

This is the senior, specialist, or leadworker level of the series. Leads assigned staff and functions as a fully qualified technician performing journey level technical tasks operating offset duplicating, or bindery machines. Regularly assigns, instructs, and checks the work of others. May supervise and train lower technicians, clerical staff, temporary or resident clerical staff, volunteers, or interns.

Further, the Office of the State HR Director's Glossary of Classification Terms defines the senior, specialist level as follows:

Senior - The performance of work requiring the consistent application of advanced knowledge and requiring a skilled and experienced practitioner to function independently. Senior-level work includes devising methods and processes to resolve complex or difficult issues that have broad potential impact. These issues typically involve competing interests, multiple clients, conflicting rules or practices, a range of possible solutions, or other elements that contribute to complexity. The senior-level has full authority to plan, prioritize, and handle all duties within an assigned area of responsibility. Senior-level employees require little supervision and their work is not typically checked by others.

Specialist - Duties involve intensive application of knowledge and skills in a specific segment of an occupational area.

The documents describing Ms. Cox's work indicate that her position performs journey rather than senior level bindery work tasks. The P&DS 3 typical work examples describe work at a level of responsibility that includes monitoring work volume and reviewing work orders to meet production deadlines; performing complex offset duplication; and proofing copies for corrections in grammar, punctuation, or format. Ms. Cox's position does not fully reach this scope of responsibility. During the Director's review conference, Ms. Cox indicated that she primarily receives work orders from Mr. LaMonte, though she has the capability to go into the system to obtain the work orders. Further, Ms. Cox orders supplies for the machines she operates, but Mr. LaMonte orders paper stock and other supplies. This limits her scope of authority to fully plan, prioritize, and handle all duties within her assigned area of responsibility.

Further, it is undisputed Ms. Cox's position has not been assigned lead responsibilities the majority of the time.

In total, Ms. Cox works as a fully qualified technician performing journey level technical tasks. Therefore, the P&DS 3 is not the best overall fit for her position's duties and responsibilities.

The **Printing and Duplication Specialist 2** (P&DS 2) definition states the following:

Functions as a fully qualified technician performing journey level technical tasks operating offset duplicating, or bindery machines. Positions work independently and exercise judgment and discretion in determining the scope or level of service. Performs repairs of machinery. Work is typically reviewed on a spot check basis after decisions have been made. Unusual problems that may occur are brought to a higher level technician with probable outcomes and solutions. May supervise and train lower level operators, clerical staff, temporary or resident clerical staff, volunteers, or interns.

Ms. Cox's position functions as a fully qualified technician performing journey level technical tasks operating bindery machines. She works independently and uses her judgment to determine the scope and level of service to provide to her customers, the departments and bookstore on campus.

The P&DS 2 typical work examples that most align with Ms. Cox's position include the following:

- Reviews instructions and schedules to determine equipment set-ups and operates . . . equipment accordingly;
- Packages forms and supplies; mails or delivers duplicated materials; arranges and keeps stock orderly; maintains production records and supply inventory;
- Operates stitching, scoring, drilling, perforating, trimming, and folding machines;
- May collate job, handfold, insert, hand gum, seal, string, laminate and hand number;
- Cleans machines, checks performance, and makes minor repairs and adjustments; schedules maintenance and service calls;
- Requisitions supplies and equipment;
- May supervise lower level staff.

The bulk of Ms. Cox's work has been described as journey level. Further, the specific tasks assigned to her position are included in the duties described in the P&DS 2 class specification.

In Salsberry v. Washington State Parks and Recreation Commission, PRB Case No. R-ALLO-06-013 (2007), the Personnel Resources Board addressed the concept of best fit. The Board concurred with the former Personnel Appeals Board's conclusion that while the appellant's duties and responsibilities did not encompass the full breadth of the duties and responsibilities described by the classification to which his position was allocated, on a best fit basis, the

classification best described the level, scope and diversity of the overall duties and responsibilities of his position. Allegrì v. Washington State University, PAB Case No. ALLO-96-0026 (1998).

It is clear Ms. Cox works hard to ensure bindery operations run smoothly. A position's allocation is not a reflection of performance or an individual's ability to perform higher level work. Rather, an allocation is based on the majority of work assigned to a position and how that work best aligns with the available job classifications. Although Ms. Cox may not perform all functions identified in P&DS 2 class specification, it provides the best overall fit for the duties and responsibilities assigned to her position.

Appeal Rights

RCW 41.06.170 governs the right to appeal. RCW 41.06.170(4) provides, in relevant part, the following:

An employee incumbent in a position at the time of its allocation or reallocation, or the agency utilizing the position, may appeal the allocation or reallocation to . . . the Washington personnel resources board Notice of such appeal must be filed in writing within thirty days of the action from which appeal is taken.

The mailing address for the Personnel Resources Board (PRB) is P.O. Box 40911, Olympia, Washington, 98504-0911. The PRB Office is located at 521 Capitol Way South, Olympia, Washington. The main telephone number is (360) 664-0388, and the fax number is (360) 586-4694.

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

c: Mary Cox
Penni Blakely, BC
Lisa Skriletz, OSHRD

Enclosure: List of Exhibits

MARY COX v. BELLEVUE COLLEGE
ALLO-11-023

A. Mary Cox's Exhibits

1. Letter of request for Director's Review from Page Rebelo, WPEA (1 page)
2. Director's Review Request form signed by Mary Cox (pages 1-2)
3. Email allocation determination from Jason Castro, HR, April 25, 2011 (pages 1-2)
4. Position Review Request signed by Mary Cox and Joe LaMonte, supervisor, on February 25, 2011(pages 1-6)
5. June 30, 2011 letter to Penni Blakely, BC, from Page Rebelo, BC, with the following attachment (emailed during conference):
 - a. Additional statement by Ms. Cox with her supervisor's agreement.

B. Bellevue College's Exhibits

1. Position Review Request from Mary Cox submitted to HR February 25, 2011 (pages 1-6) (Same as A-4)
2. Position Description for Mary Cox (pages 1-4)
 - a. Cover email from Bev Lucas, Manager, to HR
 - b. Cover email from Joe LaMonte, Supervisor, with additional comments about Ms. Cox's duties
 - c. Bellevue College Printing & Duplication Specialist 2 – 205F
3. Organizational Chart for Institutional Advancement/Printing Services (1 page)
4. Printing and Duplication Specialist 2 Class Specification (205F)
5. Printing and Duplication Specialist 3 Class Specification (205G)
6. Email allocation determination from Jason Castro, HR, April 25, 2011 (page 1-2) (Same as A-3)
7. Bellevue College Printing & Duplication Specialist 2 – 205F (with changes in core competencies – emailed during conference)

C. Additional Exhibits

1. November 1, 2011 email from Penni Blakely, BC, to Teresa Parsons with comments on Printing Stockroom Worker job class.
2. November 4, 2011 email from Page Rebelo, WPEA, to Teresa Parsons with comments on Printing Stockroom Worker job class.
3. Printing Stockroom Worker Class Specification (207H)
4. Stockroom Attendant Class Series Concept