



STATE OF WASHINGTON
OFFICE OF THE STATE HUMAN RESOURCES DIRECTOR

DIRECTOR'S REVIEW PROGRAM
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January 8, 2013

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

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

SUBJECT: Diem O'Rourke v. Bellevue College (BC)
Allocation Review Request ALLO-12-026

Director's Determination

This position review was based on the work performed for the six-month period prior to December 11, 2011, the date BC Human Resources received Ms. O'Rourke's request for a position review. As the Director's Review Investigator, I carefully considered all of the documentation in the file, the exhibits, and the written comments provided by both parties. Based on my review and analysis of Ms. O'Rourke's assigned duties and responsibilities, I conclude her position is properly allocated to the Information Technology Specialist 2 classification.

Background

On December 30, 2011, BC HR received Ms. O'Rourke's Position Review Request (PRR), requesting her Information Technology Specialist 2 (ITS 2) position be reallocated to Information Technology 3 (ITS 3) (Exhibit B-3).

BCC HR notified Ms. O'Rourke on March 19, 2012 that her position was properly allocated to the Information Technology Specialist 2 class (Exhibit B-2).

On April 17, 2012, the Office of the State Human Resources Director received Ms. O'Rourke's request for a Director's review of BC's allocation determination (Exhibit A-1).

On November 14, 2012, I conducted a Director's review telephone conference. Present for the conference were Ms. Diem O'Rourke; Mr. David Schiel, Staff Representative, WPEA; Erena Hammond, Staff Representative, WPEA; Ms. Melissa Sitzensstock, former shop steward; and Mr. Cesar Portillo, VP Human Resources, BC.

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

Ms. O'Rourke's position is located in the College's International Student Program (ISP) department. Her position provides a variety of information technology technical support to the department's international student information management systems and users. Ms. O'Rourke's duties include performing IT application database monitoring, maintenance, security, and troubleshooting functions. Her position provides support to the department's fsaAtlas and other applications.

Ms. O'Rourke describes her major job duties in exhibit B-3 as follows:

- 25% Serve as system administrator for existing applications: Account management for fsaAtlas, ISP MyBC portal, and the ISP listserv; Data management for fsaAtlas – Review, analyze, and manage the importing of data from HP to fsaAtlas.
- 20% Perform all Principal Designated School Official (PDSO) functions, report updates in the SEVIS [Student & Exchange Visitor Information System] system, and maintain complete academic and immigration electronic records.
- 10% Support, maintain, and enhance existing applications for ISP department, such as: creating custom fields in fsaAtlas; creating quarterly reports in fsaAtlas; in other ISP application: ISP MyBC portal, ISP listserv, etc.
- 10% Lead moderately sized projects for ISP department, such as the conversion CIP (Classification of Instructional Programs) codes 2000 to 2010 project, and the Recertification project with SEVIS for ISP/BC.
- 10% Lead compliance with the Department of Homeland Security (DHS) governmental reporting requirements and take responsibility for the preparation of information requested and/or required compliance with laws.
- 10% Other duties: Orient users on use and functionality of fsaAtlas; assess training needs; identify documentation needs; create documentation for users; manage fsaAtlas software license; Implement security policies and standards for fsaAtlas.
- 5% Interact with vendor to resolve straightforward problems. Consult with higher-level technical staff to resolve complex problems.
- 5% Subject matter expert for ISP international student data and reports – create and generate reports as needed by ISP, BC, and the Federal Government.
- 5% Manage and maintain ISP websites in English and three other languages.

Ms. O'Rourke states in the PRR that the, "ISP department provides one-stop quality support services to the College's international students from recruitment to post graduation. By federal law, all US schools who have international student populations are required to report their international students' status and progress to the Department of Homeland Security (DHS). With the combination of [in-] depth knowledge of F1 immigration regulations and technology, I am

responsible for maintaining, monitoring, and reporting for the entire Bellevue College (BC) F-1 international student body to the DHS through the SEVIS system for the BC ISP department..."

Ms. O'Rourke states in her comments that the ISP department uses a web-based application called fsaAtlas to maintain and report accurate international student body records and other information to the DHS. The ISP department also uses the fsaAtlas database to get international student data for analysis, marketing, and other purposes. Ms. O'Rourke states that she provides technical consulting, quality assurance, security administration, troubleshooting and other technical support regarding the application database. The fsaAtlas system also communicates information to the DHS SEVIS system. She clarifies that SEVIS is the DSH's internet-based system that monitors the visa status for F/M/J non-immigration visa holders and their dependents.

Ms. Kazumi Hada, Director, International Student Programs, is Ms. O'Rourke's supervisor. Ms. Hada completed the supervisor's section of the PRR. In her comments, Ms. Hada indicates that she does not disagree with Ms. O'Rourke's position review request; however she states she does not have any IT background or experience from which to evaluate Ms. O'Rourke's duties.

In her comments, Ms. Hada states:

As Diem is the only IT classified personnel in the department, she is expected to attend all technology related issues such as troubleshooting, providing help desk support to users, purchasing necessary equipment with supervisor's budgetary approval, creating or modifying fields in fsaAtlas to support staff and/or supervisor's report creation needs, representing ISP in both on- and off-campus technology related meetings to address the department's needs and consulting with vendors and/or higher-level IT technical staff at BC to resolve complex issues.

Summary of Ms. O'Rourke's Perspective

Ms. O'Rourke asserts she serves as a fully-qualified information technology telecommunications specialist. Ms. O'Rourke asserts she performs her work independently, which includes planning and organizing her own work and devising her own work methods to accomplish her tasks. Ms. O'Rourke asserts she exercises independent decision-making authority under the general direction of her non-technical supervisor.

Ms. O'Rourke contends she independently performs consulting, quality assurance, security administration, troubleshooting and technical support for the department's fsaAtlas database. She asserts she has added innovative approaches to established work procedures to complete assignments and coordinate a variety of small to moderate sized projects and assignments for the ISP department.

Ms. O'Rourke asserts that since the inception of the SEVIS system she has served as the system administrator for the for the entire ISP department. Ms. O'Rourke asserts she works with the software vendor to resolve straight-forward problems and consults with higher level technical staff on complex problems. Ms. O'Rourke asserts she conducts needs assessments and analyzes customer service and equipment needs using advanced hardware and software diagnostic tools and systems, and resolves complex issues or problems on her own or through consultation with higher level centralized IT support staff.

Ms. O'Rourke contends she serves as a system administrator for several systems including the fsaAtlas database, and the MyBC portal. In total, Ms. O'Rourke asserts the majority of her duties and the level of independence with which she works and her decision-making authority and level of responsibility as a whole reach the ITS 3 class. Ms. O'Rourke asserts her position should be reallocated to that class.

Summary of BC's Reasoning

BC asserts Ms. O'Rourke's duties do not reach the ITS 3 level of responsibility. BC contends the scope of her work assignments and duties do not require the use of innovative approaches to complete her tasks. BC contends that complex problems that fall outside of standard procedures and protocols are referred to the College's centralized Information Resources (IR) departmental staff for resolution.

BC asserts the scope of Ms. O'Rourke's duties do not require maintaining overall project coordination responsibility for projects. BC asserts Ms. O'Rourke does not serve as a systems administrator, and that the majority of her responsibilities are primarily in support of a single department. BC contends Ms. O'Rourke performs her other duties at a level consistent with the ITS 2 class and her position is properly allocated.

Comparison of Duties

When comparing the assignment of work and level of responsibility to the available class specifications, the Class Series Concept (if one exists) followed by the 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.

The Class Series Concept for the Information Technology series states in relevant part:

Positions in this category perform professional information technology systems and/or applications support for client applications, databases, computer hardware and software products, network infrastructure equipment, or telecommunications software or hardware.

This category broadly describes positions in one or more information technology disciplines such as: Application Development and Maintenance, Application Testing, Capacity Planning, Business Analysis and/or Process Re-Engineering...IT Project Management, Systems Software, Web Development, or Voice Communications.

The thrust of Ms. O'Rourke's position is to perform information technology applications support to the ISP department and should therefore be allocated to a class within the Information Technology series.

Comparison of Duties to Information Technology Specialist 3.

The Definition for the Information Technology Specialist 3 (ITS 3) class states:

In support of information systems and users in an assigned area of responsibility, independently performs consulting, designing, programming, installation,

maintenance, quality assurance, troubleshooting and/or technical support for applications, hardware and software products, databases, database management systems, support products, network infrastructure equipment, or telecommunications infrastructure, software or hardware.

Uses established work procedures and innovative approaches to complete assignments and coordinate projects such as conducting needs assessments; leading projects; creating installation plans; analyzing and correcting network malfunctions; serving as system administrator; monitoring or enhancing operating environments; or supporting, maintaining and enhancing existing applications.

The majority of assignments and projects are moderate in size and impact an agency division or large workgroup or single business function; or internal or satellite operations, multiple users, or more than one group. Consults with higher-level technical staff to resolve complex problems.

ITS 3 level positions independently perform IT support as a fully qualified information technology specialist within an assigned area of responsibility. Incumbents provide technical IT support and identify and resolve operational or other problems within an assigned scope of operation such as a division, or large workgroup or single business function, multiple users or more than one group. This is distinct from the ITS 2 level where the majority of assigned tasks are limited in scope, principally involving completing specified tasks or providing direct IT support to individuals or small groups of employees working within a department or unit.

The work methods used and the level of independent decision making required at the ITS 3 level often combine following pre-defined standards as well as developing innovative approaches to resolving problems or issues that arise. Positions work fully independently and complex problems are resolved through consulting with higher-level technical staff.

Incumbents at this level use established work procedures and innovative approaches to complete assignments and projects which often impact their assigned area of responsibility. Project coordination at this level requires completing all phases of an assigned project including conducting needs assessments, creating installation plans and independently leading or supervising technical IT projects to completion.

In total, Ms. O'Rourke's overall scope and level of responsibility, and her duties as a whole, do not reach the ITS 3 level of responsibility. Ms. O'Rourke's position does not have complete authority for serving as a system administrator, leading IT technical projects, or fully supporting, maintaining and enhancing existing applications as required.

Size and Scope of Work

While Ms. O'Rourke provides technical IT support to the entire ISP department, the primary scope of her work involves managing and overseeing the day-to-day collection and transmission of data to the DHS by coordinating the record/data flow from the College's Secure 92 student management system (SMS) to fsaAtlas and to the DHS SEVIS system. The majority of her assignments involves completing specified data entry and reporting tasks for the ISP department and providing direct support to front-end users in the ISP area. Her duties also include completing routine database management tasks for the fsaAtlas system. Ms. O'Rourke has some latitude for discretion but works within established methods and procedures to

complete routine or standard issues that arise on the fsaAtlas database system that she supports.

System Administrator

During the review telephone conference Mr. Portillo stated that Ms. O'Rourke does not serve as the systems administrator for the fsaAtlas application. Ms. O'Rourke monitors this system for problems and issues and makes minor to moderate corrections within established guidelines in order to maintain functionality. During the review telephone conference Ms. O'Rourke stated that when the department reports data to the DHS SEVIS system, she is in charge of the correct data entry of records and to monitor, analyze and verify data to ensure data integrity. If there is a problem with the data run she checks with the IR department for any system issues, or the SEVIS Help Desk staff to see why the data is not uploading. Ms. O'Rourke acknowledged she does not have access to the server, and that she does not make any programming or other related systems changes because the fsaAtlas database is a vendor supplied software system. According to Mr. Portillo, a higher level IR department staff position performs network and systems administrator functions for the fsaAtlas application and other network systems or related IT network infrastructure issues. This limits Ms. O'Rourke's overall authority for serving as the systems administrator for the fsaAtlas application at the level intended by this class.

Therefore, the majority of Ms. O'Rourke's duties relating to the fsaAtlas application database involve performing accurate data entry and reporting of data and also troubleshooting and resolving standard database and data problems. She also provides technical support and training to front-end users regarding application functionality, and she performs other related data entry functions. In total, her duties do not reach ITS 3 level responsibility for serving as a systems administrator.

Project Coordination

Ms. O'Rourke's position does not reach the ITS 3 level of responsibility of providing overall project coordination for her assigned projects. A portion of Ms. O'Rourke's work involves performing a variety of non-technical functions as the Principal Designated School Official (PDSO) for the ISP department. This includes responsibility for maintaining complete academic and immigration electronic records and reporting updates to the DHS through the SEVIS system.

Ms. O'Rourke indicates that during the review period, she worked on the conversion of the 2000 CIP (Classification of Instructional Programs) codes to the 2010 CIP codes. However, the focus of the 2010 CIP project was primarily non-technical in nature and involved updating a number of specified codes for majors and degree programs. Ms. O'Rourke indicates this project also included working with the fsaAtlas vendor to ensure proper coding within the database.

Ms. O'Rourke worked on another project related to obtaining DHS recertification by seeking approval from the DHS to continue accepting international students. The recertification project included gathering and collecting all required documentation, making corrections and updates to the I-17 form (i.e. the application) and submitting the completed documents to the DHS/SEVP office.

Ms. O'Rourke indicates she completed a redesign of the ISP website to meet new BC style standards. Ms. O'Rourke utilized the College's front-end website development platform to redesign the website. Ms. O'Rourke also indicates she managed a digital document conversion

project for student information to streamline the check-in process.

The overall scope of these assignments do not reach the scope of project coordination responsibility anticipated at this level of conducting needs assessments, creating installation plans and independently leading or supervising her overall projects to completion. The scope of her duties for these projects is consistent with the ITS 2 rather than ITS 3 level of responsibility.

Supporting, Maintaining and Enhancing Applications

Further, Ms. O'Rourke does not perform all of her work assignments fully independently. During the review telephone conference, Mr. Portillo stated that Ms. O'Rourke does not have decision-making authority and discretion to resolve application system malfunctions or other problems that arise. Systems issues or other problems are resolved by the IR departmental IT staff. Ms. O'Rourke works with the IR technical IT staff to implement vendor-initiated system upgrades. Ms. O'Rourke stated during the review telephone conference that she does perform limited production environment testing but not perform pre-production beta testing as part of her position duties. As a whole, her duties are limited with respect to administering system upgrades or resolving technical system malfunctions or problems.

Further, any changes outside her scope of responsibility, or issues having a broader impact are referred to the centralized BC IR departmental staff for approval/resolution. Ms. O'Rourke does not have the authority to implement changes. This limits her overall scope of responsibility and level authority for working independently.

Additionally, while Ms. O'Rourke provides technical support to individuals across the ISP department, her work is limited in scope to providing standard technical IT support to the end users themselves. This includes performing such tasks as assisting end users on functionality, correcting data input errors, resetting passwords, training front-end users on functionality, and working with management to develop and create reports and creating custom view screens. Ms. O'Rourke's quality assurance functions are more non-technical in nature and primarily relate to accurate data entry and data integrity functions only.

In total, this scope of responsibility does not reach the ITS3 level of independently providing fully qualified technical IT support and identifying and resolving moderate problems within an assigned scope of operation such as a division, or large workgroup or single business function, multiple users or more than one group. The IR department provides technical support to the College's information technology infrastructure, networks, and departmental applications and other systems. Ms. O'Rourke's position provides standard technical support for the ISP department. Ms. O'Rourke's overall scope and level of responsibility, complexity of duties, level of analysis and level of decision-making authority do not reach the ITS 3 class definition. In total, the majority of her work does not reach the level of responsibility required by this class.

For these reasons Ms. O'Rourke's position should not be reallocated to the ITS 3 class.

Comparison of Duties to Information Technology Specialist 2.

The Definition for the Information Technology Specialist 2 (ITS 2) class states:

In support of information systems and users, performs standard consulting, analyzing, programming, maintenance, installation and/or technical support.

Under general supervision, follows established work methods and procedures to complete tasks on computers and/or telecommunication software/hardware, applications, support products, projects, or databases for small scale systems or programs or pieces of larger systems or programs. Performs standard tasks such as consulting with customers to identify and analyze technology needs and problems; responding to and resolving trouble reports from users; processing equipment and service orders; coordinating installations, moves, and changes; analyzing problems for parts of applications and solving problems with some assistance; supporting and enhancing existing applications in compliance with specifications and standards; conducting unit, system or usability testing; writing specifications and developing reports; developing and conducting application, software and/or system operation training for users; or serving as part of a problem solving team addressing more complex issues. The majority of tasks are limited in scope and impact individuals or small groups. Complex problems are referred to a higher level.

The Glossary of Classification Terms defines general supervision as:

Recurring assignments are carried out within established guidelines without specific instruction. Deviation from normal policies, procedures, and work methods requires supervisory approval, and supervisory guidance is provided in new or unusual situations. The employees work is periodically reviewed to verify compliance with policies and procedures.

Ms. O'Rourke's level of responsibility for providing technical consultation, quality assurance, security administration, troubleshooting and other technical support regarding the fsaAtlas database are consistent with these statements. Under general supervision, Ms. O'Rourke follows established work methods and procedures to complete tasks for a database for the small scale fsaAtlas system. Ms. O'Rourke has some latitude when working within established methods and procedures on routine and standard issues. However, moderate or complex issues having a broader impact to the fsaAtlas system are referred to the vendor or a higher level IR IT specialist position for resolution.

Ms. O'Rourke provides standard-level technical IT support to the ISP department. Her duties include monitoring and supporting the fsaAtlas database in compliance with specifications and standards; documenting procedures; and conducting training for users. She consults with ISP staff to identify and analyze application data entry problems. She addresses technology-related issues for the department including providing help desk support to users, purchasing equipment, creating or modifying fields in fsaAtlas, creating quarterly reports in fsaAtlas, and representing the ISP department both on- and off-campus technology related meetings to address the department's needs.

Ms. O'Rourke troubleshoots standard database problems, resolving issues or referring complex problems to higher level specialists for resolution. For example, Ms. O'Rourke works with the fsaAtlas vendor to report system bugs and to resolve issues. She consults with IR department staff to solve SQL Server problems. Ms. O'Rourke states in her comments that, "When the RTI Access function in fsaAtlas failed I worked with the vendor to identify the cause and resolve the issue. When troubleshooting moved to a point that required direct access to the SQL Server, I worked with the BC SQL Server administrator to make changes on the server. Additionally, I had to make changes on each user's workstation, updating files and making changes to each user's profile." These duties are consistent with the statement in the ITS 2 definition: "supporting and enhancing existing applications in compliance with specifications and standards."

Ms. O'Rourke's responsibilities for troubleshooting technical problems, diagnosing problems, and monitoring and supporting the fsaAtlas system, the ISP MyBC portal, and performing her other duties are consistent with the level of work stated in the Definition for this class.

In total, the overall scope and level of responsibility of Ms. O'Rourke's position are consistent with ITS 2 level work. The primary thrust of her position, and the majority of her duties as a whole, falls within the scope and level of responsibility stated by the Definition for the ITS 2 class. Based on the level, scope and diversity of the overall duties and responsibilities assigned to Ms. O'Rourke's position, her position is properly allocated to the ITS 2 classification.

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 on the 4th floor of the Insurance Building, 302 Sid Snyder Avenue SW, Olympia, Washington. The main telephone number is (360) 902-9820, and the fax number is (360) 586-4694.

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

c: Diem O'Rourke
Dave Schiel, WPEA
Cesar Portillo, BC HR
Lisa Skriletz, OSHRD

Enclosure: List of Exhibits

DIEM O'ROURKE v BELLEVUE COLLEGE

ALLO-12-026

List of Exhibits

A. Diem O'Rourke Exhibits

1. Director's Review Request received April 17, 2012
2. A copy of the Position Review Request form submitted to BCC HR December 2011(does not contain date stamp)
3. BCC allocation determination memo from Penni Blakely to Diem O'Rourke dated March 19, 2012

Cover Letter from Page Rebelo submitting exhibit list with the attached exhibits, received June 8, 2012: (Exhibits are page numbered 1 - 97)

4. June 5, 2012 letter of support from Melissa Sizenstock, IT Specialist (page 1)
5. PDP Evaluation and Expectations 2010-2011 (pages 2-6)
6. fsaAtlas system administration, security policies and procedures, and quality assurance (pages 7-25)
7. Written and generated ad-hoc reports for: large groups, quality assurance, enhancement and support of existing applications, vendor interaction, manage software license, orientation of users. (pages 26-60)
8. Leading moderate sized projects: CIP Codes Project; Dept of Homeland Security Recertification Project; Website Project, Paperless Scanning Project (pages 61-96)
9. International Student Programs Organizational Chart (page 97)

B. Bellevue College Exhibits

Cover letter from Saliee Hubbard to Karen Wilcox, et. al. submitting the following exhibits, received May 25, 2012:

1. Emails between Penni Blakely and Diem O'Rourke from February 9, 2012 to March 16, 2012 (8 pages)
2. BCC allocation determination from Penni Blakely to Diem O'Rourke dated March 19, 2012 (2 pages)
3. Position Review Request form for Diem O'Rourke received by BCC HR December 30, 2011(with supervisor's signature and comments) (8 pages)
4. Penni Blakely's handwritten notes regarding Diem O'Rourke's position review
5. Position Description for Diem O'Rourke's ITS 2 position (undated) (2 pages)
6. DOP class specification for Information Technology Specialist 2, 479J
7. DOP class specification for Information Technology Specialist 3, 479K
8. Student Services Organizational Chart
9. Updated Student Services Organizational Chart