



**STATE OF WASHINGTON
OFFICE OF FINANCIAL MANAGEMENT**

STATE HUMAN RESOURCES DIVISION | DIRECTOR'S REVIEW PROGRAM
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May 28, 2014

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

FROM: Kris Brophy, SPHR
Director's Review Investigator

SUBJECT: Terry Stenzel v. Big Bend Community College (BBCC)
Allocation Review Request ALLO-13-068

Director's Determination

Mr. Stenzel's position remained allocated to the Media Technician Lead class following a management-initiated position review request from Mr. Stenzel's supervisor to the BBCC Human Resource Services office. As the Director's designee, I carefully considered all of the documentation in the file, including the exhibits presented during the Director's review telephone conference and the verbal comments provided by both parties. Based on my review and analysis of Mr. Stenzel's assigned duties and responsibilities, I conclude his position is properly allocated to the Media Technician Lead class.

Background

On March 11, 2013, Mr. Stenzel's supervisor, Mr. Scott Carsey, Information Systems Manager requested that Mr. Stenzel's position be reviewed for reallocation to the Media Technician Supervisor class. Mr. Stenzel completed a Position Review Request (PRR) form on June 5, 2013. His supervisor signed and submitted the form to BBC-HR on June 10, 2013.

On July 31, 2013 BBC-HR notified Mr. Stenzel that his position was properly allocated to the Media Technician Lead class (Exhibit B-1).

On August 29, 2013, State HR received Mr. Stenzel's request for a Director's review of BBC's allocation determination (Exhibit A-1).

On April 24, 2014, I conducted a Director's review telephone conference. Present during the call were Terry Stenzel; Kim Garza, V.P. of Human Resources, and Robin Arriga, Human Resource Consultant 2, BBCC.

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

Mr. Stenzel is a member of the Big Bend Technology department (BBT). Mr. Stenzel directs media support operations for the BBCC Advanced Technical Education Center (ATEC) media equipment and other classroom media equipment used throughout the BBCC campus. Mr. Stenzel's duties and responsibilities are summarized from the PRR (Exhibit B-3) as follows:

47.5% **Major Duty:**

Providing in-meeting technical help sporadically and for the duration of all events and BBCC campus-wide classrooms.

Tasks:

Attending weekly meeting with ATEC BBCC coordinators weekly with M&O, Sodexo food services, vice-president assistant, BBCC ATEC booking event coordinator, (charging meeting), while representing BBCC myself.

Scheduling my assistant A/V technicians according to time period, technician needs, or how many have to work the same event after finding out all the information from the actual event client.

Providing all A/V technician needs for event big and small.

Supervise a crew of three for Recording events, pre-production, post-production, and I do the invoicing.

Setting-up events before the start.

Zeroing out events after the end.

Deciding the specific technician audio needs either through touch screen or audio mixer sources.

Supervise up to four people for the agenda for huge banquets/auctions etc. needing all switching or video sources or camera use to screens during events while following the client's agenda.

We provide all the needs of performers except performing. Mostly this would be BBCC ASB using the ATEC Conference Center for DJ's, comedians, folk bands, full-fledged rock or country bands, magicians, mentalists and professional guest speakers. When a big banquet for a company, hospital, or charity brings their performers in to present to the banquet we provide them with all the equipment they will need, finding out the agenda way before the event. Items provided include all set-up and tear-down, mics, DJ's, speakers, a portable sound system, mic stands, all hook-ups, sound checks, video, video hookups, and anything else used in professional performances. For those I

pick up to four staff which I supervise.

Performs all forms of editing required for ATEC events, BBCC Administration, BBCC faculty and BBCC staff. This includes videography, audio, editing programs, (Casablanca solitaire & Mac Final Cut Pro Academic), ink jet Labels, VCR-DVD-DVR dubbing, pre- and post production, final product, copying and using the DX-2 disc publishing system.

Provide staffing schedule for each separate and every separate event.

Providing all classrooms with AV equipment possible technician assistance campus-wide, assigning duties to my assistants while completing to work also.

27.5% **Major Duty:**

Insuring the correct operation of all BBCC/ATEC conference center equipment and systems including servicing such A/V equipment throughout the BBCC campus.

Tasks:

Troubleshooting and diagnosis of equipment problems and failures.

Supervise up to 2 people during any bigger equipment troubleshooting needs. Assign the technician scheduled work orders to A/V technician assistants considering their capabilities. Train my work staff on service orders and correct methods. When needed seek information from vendors applying to electrical schematics and flow of operation inside of electronic systems.

Assign my work team to provide multiple searches when necessary. Provide the request of purchasing parts and supplies through a purchase order approved by the BBT supervisor.

To keep stock and inventory of repetitive maintenance parts needed, as in projector bulbs etc. with my team aware of stocking efficiently and in order.

To install any parts, to send defective equipment and install the repaired units sent by RMA to a dealer/company correctly into the system, utilizing up to two Assistant A/V technicians to supervise.

To constantly insure of repaired merchandise, repaired equipment, and installations of proper operation.

To search for a defective unit's replacement when the unit is not supported or available anymore. To check for and consult on the shelf life of a system and when new equipment or a system should be updated with progress and better equipment being created, such as HD, HDMI, or future creations.

Have meeting with the BBT department for all of our areas solutions to problems or progress.

To search for, provide a purchase order for, and install new systems into any areas of BBCC.

Supervise an installation team with up to 3 A/V technician assistants.

To annually check, clean, and maintain all campus-wide equipment around Labor Day or before the fall quarter starts and this involves the supervision of the ATEC/BBT assistant technicians to manage and coordinate and complete in an organized, efficient manner, getting it completed as quick as possible.

Keep an updated work order section on campus-wide Helpdesk while drolling out which A/V technician will be doing what.

After power outages occur day or night, I canvas, navigate, coordinate, and assign my staff, (1-4 Assistant AV Technicians, depending upon the severity of the outage), to cover the 1800 building's equipment to restart operation of all systems, correct any problems found, and replace equipment destroyed while insuring all scheduled events may occur as planned. Also assist BBT campus-wide if requested or necessary.

8.5% **Major Duty:**

Set up, record on, and remove a designated mediasite station.

Tasks:

Determining whether a recording through mediasite is preferred to recording video to DVD. Perform and supervise a team of up to three Assistant A/V technicians to completion of this task which includes:

- Installing the rover portable mediasite into the arena requested for an event
- Installing the manual set-ups including the wiring and creating a video station in the Hardin Room.
- Installing all patching and audio feeds via video mixer, audio mixer, and RGB VGA control center.
- Zeroing and returning to normal in whichever venue it was attached to for normal use again.
- Provide Techs for performing all actions in recording to mediasite for the duration of the event.
- Insure for and repair operation for correct site and recording audio and video.

16.5% **Major Duty:**

Provide preparations, assessments, implementing, and scheduling of events to fulfill their agenda requirements with all of their tech (sic) needs.

Tasks:

By the tasks requested, determine the client with whom we need direct communication about event.

Schedule all practices, testing of video material if not normal, and come up with alternative methods of performing the tasks requested for their event while being sure to have me and the scheduled technician assigned to the event present during all pre-event actions.

Reservation and booking of special equipment requested.

Upon information pertaining to the specifics of an event, schedule the right number of technicians needed and at what times the technician or technicians are scheduled beginning to the end of their shift with relief if necessary.

Schedule and set-up testing times before the event happens when there is a request for downloading special programs by 1st informing BBT supervisor and

having him at the scheduled test, schedule the event's other presenters to be able to attend the test, and all of my technicians I've scheduled to work at the event in attendance also.

Keep tech requests within our ability of what we have, keep in mind budget for any accessories the event requests us to provide, determine which requests will be deemed to be the event scheduled group to be responsible, and make sure the requests of every event are handled satisfactory and professional.

Keep all requests from an area besides our own directed to the responsible party that can solve it.

Be calm, polite, and attend to every need of the client from beginning to end and keep them informed of any problem that needs to be rectified during the event.

Insure I'm keeping my techs in all loops of what will be needed to be done, instruct how to operate or change our equipment settings in detail for each tech assigned while stressing to them of staying courteous and attentive to our client for any event, while clueing them on clients they may not know.

Summary of Mr. Stenzel's Perspective

Mr. Stenzel asserts he performs the work of a Media Technician Supervisor by supervising Media services Audio Visual (A/V) technicians and also overseeing and directing all media-related activities and operations for the BBC ATEC and campus as a whole.

Mr. Stenzel contends his supervisory duties for the temporary technicians include assigning and scheduling work, acting upon leave requests, providing training, giving verbal performance evaluations, and addressing performance issues when necessary, which may include all disciplinary actions up to and including termination.

Summary of Big Bend Community College's Reasoning

BBCC acknowledges Mr. Stenzel's technical knowledge and expertise in running Media services technical operations. However, BBCC asserts the level of work direction Mr. Stenzel provides to the department's A/V temporary technicians do not reach the full scope of supervisory authority required for allocation to the Media Technician Supervisor class. BBCC asserts temporary employees do not have formal processes in place for granting leave approval, approving work schedule changes, and conducting performance evaluations. BBCC asserts there is no formal disciplinary process for work study student employment. BBCC contends the scope Mr. Stenzel's personnel administration responsibilities are limited as supervisory responsibility for personnel related functions are retained by his supervisor or higher level management.

BBCC contends Mr. Stenzel's duties and responsibilities are consistent with the Media Technician Lead classification and his position is properly allocated to that 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 Media Technician Supervisor

The Definition for Media Technician Supervisor states:

Supervise staff and oversee the operation, maintenance and scheduling of media equipment, materials and facilities; coordinate the production of media materials for instruction, institution promotion, staff development, and/or special events.

The Distinguishing Characteristics for this class state:

With delegated authority, interview and recommend selection of applicants, conduct training, assign and schedule work, act upon leave requests, conduct annual performance evaluations and recommend disciplinary action.

Coordinate a variety of activities in media services such as graphics, photography, audio visual and video equipment operations, and multi-media computerized systems operations.

The State HR *Glossary of Classification Terms* defines **supervisor** as follows:

An employee who is assigned responsibility by management to participate in all of the following functions with respect to their subordinate technicians:

- Selecting staff
- Training and development
- Planning and assignment of work
- Evaluating performance
- Resolving grievances
- Taking corrective action

Participation in these functions is not routine and requires the exercise of individual judgment.

Additionally, the PRB has provided further guidance on the definition of supervision. The PRB determined that “[s]upervision of an organization typically includes setting organizational goals, developing plans to meet goals and objectives, developing policies and procedures, preparing budgets, adjusting and authorizing expenditures, controlling the allocation of program resources, and the supervision of staff.” *Dawson v. South Puget Sound Community College*, PRB Case No. R-ALLO-08-001 (2008).

Therefore, in order to meet the definition of the Media Technician Supervisor class, an incumbent must have full supervisory responsibility over assigned staff and oversee the operation, maintenance and scheduling of media equipment, materials and facilities. The overall scope and level of responsibility assigned to Mr. Stenzel’s position does not reach having full supervisory responsibility over BBT media services’ staff as required.

In Dawson, the Appellant argued that he performed supervisory responsibilities for contract, part-time and work-study staff. However, the PRB determined his position provided "on-the-job work instruction" but did not "perform training and development at a level expected of a supervisor." While the PRB concluded the Appellant had oversight of the daily work, provided feedback, and responded to service complaints related to the service provided, he did not conduct formal performance evaluations or adjust formal grievances. As a result, the PRB determined the Appellant's position was properly allocated to a lead classification.

Therefore, while it is undisputed that Mr. Stenzel exercises his knowledge and expertise to run BBT media services technical operations, the level of work direction Mr. Stenzel provides to the department's A/V temporary technicians does not reach the full scope of supervisory authority required for allocation to the Media Technician Supervisor class.

Mr. Stenzel's duties are best described as leading the department's student and part-time temporary A/V staff. The A/V technicians assist in setting up, operating and offering support to departmental faculty and staff for media services. Mr. Stenzel coordinates their work schedules and leave requests to make sure there is adequate coverage. Mr. Stenzel stated he makes verbal agreements with the part-time technicians regarding leave issues, and has authority to make work schedule decisions for the unit's day-to-day operations. Mr. Stenzel provides work guidance and direction and provides training to make sure they are able to operate equipment properly and assist faculty, staff and outside customers with operating media equipment for classroom and events.

The parties acknowledged during the review telephone conference that the college's process for hiring, evaluating performance, and scheduling and approving leave for student and temporary technicians is different from the process used for permanent technicians.

With regard to hiring, Ms. Kamin stated the student and part-time temporary AV technicians are hired using a different process from permanent, classified technicians. Mr. Stenzel stated he normally reviews applications, interviews applicants and usually makes the hiring decision on his own; however, at other times he makes recommendations to his supervisor who then makes the final decision based on the overall needs of unit.

Mr. Stenzel stated the evaluation process consists of providing verbal feedback to the staff, and he provides training on technical processes and procedures, and he assigns and checks their work. He also talks about performance issues and that may give performance feedback, if necessary. He stated that his supervisor may be involved to discuss issues or problems with an employee, if he believes it is necessary for his supervisor to be involved. He also sets the work schedule for the technicians to ensure coverage. As a result, technicians make requests for time off through him, so that he can plan accordingly.

While Mr. Stenzel may at times perform some equivalent functions of a supervisor, the overall level of responsibility of his position and the scope of his responsibilities for hiring, evaluating and correcting performance is more in line with a lead position. Although performance evaluations may be performed in a way that differs from the Performance Development Plan (PDP) process, the PDP process requires more in-depth assessment than assigning, training, checking the work of technicians, and providing verbal feedback.

Mr. Stenzel has responsibility for scheduling and assigning work, acting upon leave requests, providing training regarding proper departmental operations, procedures and practices. However, Mr. Stenzel does not have delegated supervisory authority and responsibility for

conducting formal performance evaluations, adjusting formal grievances or taking formal corrective actions as required for allocation to a supervisory classification. In addition, Mr. Carsey states in his comments that he retains final supervisory authority for certain management-level functions for Media services.

Based on the information provided, Mr. Stenzel's position does not perform the full scope and level of supervisory activities required for allocation to the Media Technician Supervisor class.

Comparison of Duties to Media Technician Lead

The Definition for the Media Technician Lead class states:

Lead others and produce audio-visual instructional materials for classroom instruction, institutional promotion, staff development and/or special events; set up, operate, and maintain media equipment and systems such as film and slide projectors, overhead projectors, VCRs and monitors, multi-media systems, audio and video recording and playback systems, interactive computers, LCD displays, and Laser disc units.

The Distinguishing Characteristics for this class state:

Regularly assign, instruct and check the work of others.

Under general supervision, coordinate the activities of media services such as equipment scheduling and distribution, technical services and production and presentation of audio-visual materials; perform technical support in the set up and operation of media equipment and systems and the production of audio-visual, video and media materials such as slides, B/W and/or color photographs, overhead transparencies, films, recordings, charts and posters.

Mr. Stenzel's position closely matches the Definition, and Distinguishing Characteristics of the Media Technician classification. Mr. Stenzel has designated responsibility to lead others which includes responsibility to regularly assign, instruct, and check the work of the BBT media services AV part-time staff on an ongoing basis.

His duties are fully consistent with the level of work described by this class. He independently coordinates and directs the daily activities of the Media services unit. During the review telephone conference, the parties explained that Mr. Stenzel has responsibility for overseeing and processing all media-related requests that come to his unit. Mr. Stenzel plans and schedules staffing schedules and work assignments for the media technicians in the unit. He occasionally reviews work assignments with Mr. Carsey but this is rare.

Staffing assignments vary according to the skill sets and staffing levels needed to complete each event. Mr. Stenzel assigns one or more technicians to assist him if more than one worker is needed. Mr. Stenzel also reassigns staff to other assignments based on unforeseen issues or needs that arise. Mr. Stenzel also informally modifies work assignments to accommodate informal leave requests from the part-time staff.

His position is also responsible for providing, overseeing, and directing all technical support in the set up and operation of media equipment and systems and the production of audio-visual,

video and media materials and equipment for the BBC ATEC conference center and campus departments.

Mr. Stenzel's overall level of responsibility and decision making authority, as well as his responsibility for coordinating the media services functions at BBCC fit within the Media Technician Lead classification.

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).

In this case, the majority of the duties assigned to Mr. Stenzel's position and his level of responsibility and delegated authority are best described by the Media Technician Lead 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 fax number is (360) 586-4694. ***This mailing address and fax number will remain unchanged.***

However, on June 16, 2014, the PRB will move from its location in the Insurance Building at 302 Sid Snyder Avenue Southwest, to 128 - 10th Avenue Southwest, Olympia, Washington. The contact telephone number will also change on that date.

To verify an appeal has been received, or to arrange to hand-deliver an appeal, call 360-902-9820 through Friday, June 13, 2014, and 360-407-9501 after that date.

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

c: Terry Stenzel
Kim Garza, BBCC
Lisa Skriletz, State HR

Enclosure: List of Exhibits

TERRY STENZEL v BIG BEND COMMUNITY COLLEGE
ALLO-13-068

List of Exhibits

A. Terry Stenzel Exhibits

Letter of appeal from Terry Stenzel to Office of State HR received by State HR on August 29, 2013

List of exhibits with the following attachments:

1. Copy of Request for 'Request of a Director's Review of reallocation from Terry Stenzel to State HR
2. The employee portion of the Position Review Request, along with additional pages of "Identify the duties that have changed since you Position was last reviewed"
3. Involvement in hiring practices
4. Employee work scheduling
5. Employee direction and abrupt scheduling
6. Employee training and direction
7. Actions towards A/V Tech Assistants
8. July 31st final meeting with Kim Garza before decision
9. Comments from BBT Director Scott Carsey
10. Rebuttal to BBCC Human Resources Director Kim Garza points

B. BBCC Exhibits

1. Determination Letter with Attachments
2. Position Posting/Description
3. Performance Expectations and Definitions
4. Organizational Chart
5. Position Review Request – Employee Portion
6. Supplemental Documents from Employee
7. Position Review Request – Supervisor Portion
8. Supervisor's Request for Position Review
9. Letter to Employee Regarding Position Review
10. Definition of Lead from Glossary of Classification Terms
11. Definition of Supervisor from Glossary of Classification Terms
12. Notes from Supervisor Interview
13. Notes from Employee Interview
14. Email from Mary Rodriguez, HR Consultant-OFM, Re: "delegated authority"
15. Media Technician Lead Class Specification with Notes

16. Media Technician Supervisor Class Specification with Notes
17. List of Part-time AV Assistants
18. BBCC final response

C. Class Specifications

1. State HR class specification for Media Technician,
2. State HR class specification for Media Technician Lead,
3. State HR class specification for Media Technician Supervisor,