



STATE OF WASHINGTON  
OFFICE OF FINANCIAL MANAGEMENT

STATE HUMAN RESOURCES DIVISION | DIRECTOR'S REVIEW PROGRAM  
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April 17, 2015

TO: Connie Goff, PHR  
Rules and Appeals Program Manager

FROM: Meredith Huff, SPHR  
Director's Review Program Investigator

SUBJECT: Debra Bell at WA State Parks and Recreation Commission (Parks)  
Allocation Review Request ALLO-14-027

**Director's Determination**

This position review was based on the work performed for the six-month period prior to December 23, 2013, the date stamped when Parks' Human Resources received Ms. Debra Bell's request for a position review. (Exhibit B-2) As the Director's Review Investigator, I carefully considered all of the exhibits and information gathered during a review conference on March 18, 2015. Based on my review and analysis of Ms. Bell's assigned responsibilities and duties, I find her position is properly allocated to the class of Customer Service Specialist 2.

**Background**

Ms. Bell submitted her Position Review Employee Portion form dated December 18, 2013 to Parks' Human Resources Office on December 23, 2013. (Exhibit B-2)

On February 21, 2014, Ms. Cari Anderson, Human Resources Consultant for Parks, notified Ms. Bell by letter that her position was appropriately classified at Customer Service Specialist 2. (Exhibit B-1)

On March 12, 2014, the State Human Resources Director's Review Program received Ms. Bell's request for a Director's review of Parks' classification determination. Ms. Bell indicated she believes Customer Service Specialist 3 is a more appropriate class for her duties. (Exhibit A-1)

On March 18, 2015, I conducted a Director's review conference with the following participants:

Debra Bell, employee;  
Phyllis Naiad, WFSE, representative;  
Melanie Ford-Bissey, WSPRC, former supervisor to Ms. Bell;  
Tom Riggs, Park Ranger 3; Assistant Park Manager;  
Jeff Wheeler, Park Ranger 4; Park Manager, second level supervisor to Ms. Bell;  
Jenny Warnstadt, Human Resources Operations Manager at Parks;  
Cari Anderson, Human Resource Consultant 3; and  
Kayci Brand, Human Resource Consultant 3.

### **Guidance 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. 3712-A2 (1994).

The Personnel Resources Board (PRB) has held the following: Because a current and accurate description of a position's duties and responsibilities is documented in an approved classification questionnaire, the classification questionnaire becomes the basis for allocation of a position. An allocation determination must be based on the overall duties and responsibilities. Lawrence v. Dept. of Social and Health Services, PAB No. ALLO-99-0027 (2000).

### **Position Review Request Employee Portion Form (Exhibit B-2)**

Ms. Bell's duties and responsibilities are described on the PRR as follows:

**50% Major Duty:** Reservations:

Process reservations requests via phone/email; Assist group leaders & individuals to best organize accommodations; Operate multi-line phone system and cell phones (Problem solve computer software issues, fix entry errors and problems.)

**25% Major Duty:** Senior Customer Service:

Generate and track customer correspondence; Intra-park communications/correspondence; answer customer questions, deal with complaints and issues; Interprets cross agency policy to customers; communications "hub" for main park and satellite park.

**15% Major Duty:** Training, Staff Scheduling, Supervision:

Under direction of EC4, mentors and trains lower level staff on reservations system, SMS/Host computer program instruction & overview; Assigns and assures office staff coverage at Welcome Center; Assists scheduling of Volunteer drivers; General Office policy/procedures training; interpret park policy as it concerns reservations & guests; Supervise 1 park aide for reservations/office work. Establish and integrate seamless transition to new Agency policies into daily routines.

**5% Major Duty:** Purchasing/ Cash Handling:

Maintain and process credit card log; reconcile daily cash receipts; Purchasing of replacement park items; verify contract purchasing requirements; comparative price shop for best value; establish and maintain cell phone use under Agency policy; PIA merchandise purchases.

**5% Major Duty:** Inventory/ Merchandise:

Maintain PIA sales merchandise, perform 2x/year merchandise inventory reporting; work with Friends group (Cama Beach Foundation) to share icon merchandise for their sales – maintain records for same.

Ms. Bell makes decisions, without consultation with her supervisor, about staffing, crisis/emergency resolutions, policy interpretation, allowing guests to drive to cabin or beach; and contracting repair services. Decisions such as overnight rate changes; fees and purchasing require prior approval from her supervisor.

Ms. Bell has responsibility for maintaining fiscal records notes; she is responsible for controlling or authorizing the expenditure of funds. She describes this responsibility as: "Limited to use of credit card for approved purchases; assuring contract compliance for approved larger purchases; and cost comparisons for non-contract approved purchases." (Exhibit B-2)

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

On the Request for Director's Review form, Ms. Bell describes her duties and responsibilities that she believes are outside of her CSS 2 as:

"Lead, Purchasing, training for new/senior staff, works w/Center of Wooden Boat, Foundation, interprets agency-related laws, policies and procedures particularly to guests." (Exhibit B-1)

During the conference, Ms. Bell indicated that she fills the role of office lead and provides direction and training to others. She schedules herself and other employees to ensure there is coverage during park hours. She noted that Cama Beach is not part of the on-line reservation system used by many state parks. Rather, Cama Beach reservations are directly made by staff using the SMS/HOST program. She described SMS/HOST as a powerful and complicated program with 13 windows and many possibilities for getting trapped in loops. Ms. Bell noted that she is knowledgeable about this program and helps others get out of the loops.

Ms. Bell discussed her efforts with other Park staff to coordinate and prepare for the twice-a-year, traditional Upper Skagit Tribal clamming at Cama Beach. She noted that Cama Beach is a historic potlatch area and one area is used for the Tribal clamming and ceremonies. For these events, Ms. Bell checks each person's identification card to ensure that only tribal members are granted entrance. She notifies enforcement if people do not have the proper identification. She schedules the shuttles to move members to and from the parking lots. Ms. Bell noted that the clamming event is not usually scheduled in advance and it requires extra efforts to provide accommodations. She noted that often it is necessary to move guests and to ask other visitors to reschedule to a later date. Ms. Bell noted that one time the Tribal Elder and Youth Ceremony was also held at Cama Beach.

Ms. Bell described her work with the Cama Beach Friends group (a 503c organization) which sells merchandise in the Cama Beach Park store from April through Labor Day. Ms. Bell is responsible for the PIA merchandise which has the Cama Beach logo and is available for sale. She researches, orders, purchases and stocks supplies and souvenirs, tracks the money, and completes merchandise inventories.

Ms. Bell stated she has built a good working relationship with the Center for Wooden Boats, a private organization, which is located at Cama Beach. She described incidents where she worked closely with this group to make arrangements for emergency use of the Center's facilities and on other occasions when the Center arranged similar use of Cama Beach facilities. Ms. Bell noted that this working relationship is very helpful when emergencies occur.

Ms. Bell described some of the difficult issues she deals with as follows:

- Confusion over the requirement to display a Discovery Pass on a car in the Cama Beach parking lot. Frequently customers who stop at the Café do not have a pass and do not want to buy one. She enforces the parking rules.
- Campers who try to take pets into cabins which are not designated as "pet cabins". She will advise the campers and inform Park Rangers so they are aware of these situations.
- Finding other accommodations for guests when Cama Beach cabins are unusable or not available. She may seek assistance from the Center for Wooden Boats in these situations.
- Guests who want to drive to the beach rather than take the scheduled shuttles. Driving to the beach is not allowed, except in unusual situations.

Ms. Bell indicated that she has cross-agency responsibilities that include working with Dept. for Enterprise Systems for contracts and purchases. She noted that she normally researches purchases and will use the "best buy" method rather than going with the state contracts. She normally can find a better quality item at a lower price. She makes necessary furniture purchases through Dept. of Corrections.

Ms. Bell believes the Customer Service Specialist 3 is a better match for her assigned duties and responsibilities.

### **Summary of Supervisors' Perspective**

Ms. Melanie Ford-Bissey completed the PRR Supervisor's portion. She noted that she agrees that Ms. Bell's information on the PRR-Employee's Portion, including the Position Purpose and Work Activities, is accurate and complete. She acknowledged that Ms. Bell has lead responsibilities. She agreed with the description of Ms. Bell's decision making authority. She indicated that Ms. Bell works under general direction.

She described Ms. Bell's decision making authority as including: purchasing, scheduling the staff in the Welcome Center; scheduling volunteers; booking groups; coordinating with Friends Group's merchandise acquisition; and emergency cabin rescheduling.

The following decisions required Ms. Ford-Bissey's approval: Booking Cama Center with groups, changing employees' regular working schedule, and spending authority. (Exhibit B-2)

Ms. Ford-Bissey attended the conference on Ms. Bell's behalf, although she no longer supervises Ms. Bell. She explained that during the review time period, Ms. Bell acted in a role as her assistant. She indicated that Ms. Bell is responsible for all the reservations and the Welcome Center. She resolves any problems or concerns for the guests. Ms. Ford-Bissey indicated that Ms. Bell is the main person to handle all check-in and check-out issues for guests, resolve problem issues, schedule staff and volunteers, and communicate with other parks and organizations regarding reservations and related concerns.

Ms. Ford-Bissey schedules the reservations for the Cama Beach Event Center. However, she noted that in her absence, Ms. Bell provides information and pencils in potential reservation dates for Ms. Ford-Bissey's action upon return. Ms. Bell talks to potential customers about the Event Center's services, capacity, possible reservation dates, parking and contracted services that customers may want to use such as caterers.

During the review conference, Mr. Jeff Wheeler, Ms. Bell's second-level supervisor, stated he feels Ms. Bell works at the CSS3 level. He felt that Cama Beach is a unique park and has unique responsibilities. He asserted that the nature of Ms. Bell's position requires that she maintain a unique partnership with Fort Worden Park, The Center for Wooden Boats organization and Tribal organizations. He said Ms. Bell assists in writing policies and procedures particularly for the Cama Center which is reserved and rented for special events. He confirmed that Ms. Bell has the role of Purchasing Officer. Mr. Wheeler indicated that he feels Ms. Bell repeatedly works outside her current classification of Customer Specialist 2.

### **Parks Human Resource Perspective**

By letter dated February 21, 2014, Ms. Cari Anderson, Human Resource Consultant, Parks Human Resources Office, advised Ms. Bell that a position review had been completed. The determination was that Ms. Bell's position was appropriately allocated at the Customer Service Specialist 2 classification. (Exhibit B-1)

During the March 18, 2015, conference, Ms. Jenny Warnstadt indicated that the review of Ms. Bell's position was based on the description of work and the percentage of work time indicated on the Position Review Request form. She noted that 50% of Ms. Bell's work time is spent processing reservation requests and related responsibilities and 25% of work time generating and tracking customer correspondence inside and outside of Parks for a majority of 75% of her work time.

Ms. Warnstadt indicated that comparing Ms. Bell's responsibilities to the Customer Service Specialist 2 and 3 classes indicated that the Customer Service Specialist 2 best matched and described the majority of Ms. Bell's stated duties.

### **Comparison of Duties to Class Specifications**

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 referenced Allegrì v. Washington State University, PAB Case No. ALLO-96-0026 (1998), in which the Personnel Appeals Board noted 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.

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 Customer Services Specialist Series**

#### **Class Series Concept for all Customer Service Specialist classes is on the CSS1 (102A):**

Positions in this series provide assistance and problem resolution to agency clients/customers and are located in a designated customer service program. The intent of

the series is to assist clients/customers in identifying agency processes and procedures, resolving client/customer problems related to agency programs and interpreting agency related laws, policies and procedures. Positions at all levels may be assigned lead or supervisory responsibility over lower level staff.

This series is not clerical in nature. Clerical support duties are incidental to the total work assignment (less than 10%). Clerical support, for the purposes of this series, includes tasks such as maintaining filing systems, maintaining logs, updating computer or manual data systems, office and telephone reception, completing office forms, compiling and completing recurrent reports, performing routine typing, copy work and preparing mailings.

This occupational category is considered a technical occupational category. Positions assigned to this occupational category have authority to accept, grant or deny agency services or may mediate between the business of the agency and the client (example: Attorney General's Consumer Protection Unit). Some positions may train and provide leadership to volunteers.

Ms. Bell provides assistance and problem resolution to Cama Beach's guests and customers. She is responsible for scheduling and ensuring staff coverage in the Welcome Center. Ms. Bell assists guests/customers in the Park's reservation processes and procedures specific to Cama Beach, and resolves client/customer problems related to reservations and guest services. Her position interprets Parks procedures and related agency laws, policies and procedures. Ms. Bell's position has lead responsibility for other staff. She supervises one part-time employee. Ms. Bell's responsibilities include providing assistance and problem resolution to Parks' clients. Her position is expected to provide oversight and customer service for the reservation program and guest services at Cama Beach.

Ms. Bell's position is described by and consistent with the expected duties of the Class Series Concept of the Customer Service Specialist and should therefore be allocated to a class within this series.

### **Comparison of Duties to Customer Service Specialist (CSS) 3 (102C)**

The **Definition** for the Customer Service Specialist 3 states:

Serves as a senior customer services specialist handling complex, cross-agency customer problems. Mentors and trains lower level staff in aspects of client/customer relations and problem resolution. Interprets agency-related laws, policies and procedures.

This class does not contain a Distinguishing Characteristics.

Ms. Bell serves as a senior customer services specialist providing direct lead support for guest services, reservations and resolving reservation and other emergency problems at Cama Beach. She schedules employees and volunteers to staff the Welcome Center during all hours Cama Beach is open. She supervises one part-time position. Ms. Bell mentors and trains lower level staff in various aspects of client/customer reservations and problem resolution as a function of her position. She provides information to guests on complicated parking regulations and the Discovery Pass, the reservation process, and Cama Beach's hours, facilities and services.

However, Ms. Bell's assigned responsibilities, as described on the PRR, do not reach the level of "*complex, multi-dimensional, cross-agency customer problems*" as anticipated by the Definition of the CSS3. During the review conference, Ms. Bell and her supervisors discussed various guest issues and problems that are internal and limited to Cama Beach. Ms. Bell's transactions with the Department of Enterprise Systems for purchases and with the Department of Corrections to purchase furniture, generally follow procedures and processes that are in place and do not reach the level of complexity expected by this class.

Therefore, while aspects of her work and a portion of her assigned duties reach senior-level responsibility as required by this class, the focus of her position, and the majority of her assigned work duties do not fully reach the primary allocating factors required for allocation to this class. The Customer Service Specialist 3 is not the best fit for Ms. Bell's position.

### **Comparison of Duties to Customer Service Specialist 2 (CSS2) (102B)**

The **Definition** for the CSS2 class states:

Independently resolves complaints, inquiries and client/customer service problems while maintaining appropriate confidentiality. Provides agency interpretation and applies knowledge of laws, regulations, and processes in the resolution of inquiries, complaints and problems.

The Customer Service Specialist 2 classification does not have Distinguishing Characteristics.

The majority of Ms. Bell's responsibilities are consistent with the job duties described in the Definition of the Customer Service Specialist 2 class. Her responsibilities at Cama Beach require her to independently resolve complaints, inquiries and customer service/ reservation problems. Examples of Ms. Bell's work included dealing with customers who do not have a Discovery Pass for parking; the need to change cabins for customers due to electric or water outages; and providing information to potential customers wanting to rent the Event Center. She provides interpretation of Park regulations specific to Cama Beach and applies them as necessary in the reservation and customer service process.

Ms. Bell's responsibilities are aligned with the Definition of the Customer Service Specialist 2 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 provides an example of the level of work assigned to the Customer Service Specialist 2 class which aligns with Ms. Bell's responsibilities.

- Acts as liaison between clients/customers and agency; ...
- Independently resolves client/customer problems by identifying the issues, determining procedural steps necessary to bring resolution, working with program staff to implement resolution, and communicating results to the client/customer;
- Creates and manages customer profiles and maintains integrity of the data and information while delivering specialized services.

Ms. Bell uses independent judgment to assist Cama Beach guests in making reservations for cabins, handling emergency situations that require guests to be moved to other accommodations, providing information about the Events Center to potential customers; coordinating the Tribal clamming events and building relationships with related groups. She works closely with the volunteer Friends of Cama Beach and the Center for Wooden Boats. She schedules staff to cover the Welcome Center and ensures that volunteer shuttle drivers are available to transport guests to/from their cabins and/or the beach as requested. The overall scope, level of responsibilities and activities assigned to Ms. Bell's position are consistent with the expectations of the Customer Service Specialist 2.

It is evident that Ms. Bell has an integral role in ensuring quality service for Cama Beach's guests and customers. However, a position's allocation is not based on an evaluation of performance but rather the majority of work assigned to a position. Based on the overall scope of her assigned responsibilities and duties, the Customer Service Specialist 2 classification is the best fit for Ms. Bell's position. Her position is appropriately allocated as Customer Service Specialist 2.

### **Appeal Rights**

RCW 41.06.170 governs the right to appeal. RCW 41.06.10(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 3<sup>rd</sup> 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.

Cc: Debra Bell, Employee  
Phyllis Naiad, WFSE Representative  
Jeff Wheeler, Area Manager, Cama Beach  
Cari Anderson, Parks' Human Resources  
Jenny Warnstadt, Parks' HR Operations Manager

Enclosure: List of Exhibits

A. Debra Bell Exhibits

1. Request for Director's Review.
2. Performance and Development Plan (PDP) for D.Bell 2013-2014
3. Performance and Development Plan (PDP) for D.Bell 2012-2013.
4. Performance and Development Plan (PDP) for D.Bell 2011-2012.
5. Performance and Development Plan (PDP) for D.Bell 2010-2011.  
Performance and Development Plan (PDP) for D.Bell 2009-2010.
6. Staffing Calendar created by D.Bell for September – December 2013.
7. Tutorial Training Manual created by D.Bell for SMS/Host Reservation Program
8. Cabin Rates List Expanded with Reservation Fees Calculated for Staff Use.
9. Email dated July 23, 2013, Communications Policy for Camano Island SP.
10. Email dated August 1, 2013, Bungalow H Update for Staff.
11. Email dated November 13, 2013, Thanksgiving Policy Update.
12. Email dated December 18, 2013, Groups & Reservations Clean-up Request.

B. PARKS Exhibits

1. Allocation Determination letter to Ms. Bell dated February 21, 2014.
2. Position Review Request received by Parks HR Office December 23, 2013.
3. Organizational Chart dated April 9, 2013.
4. Position Description form for Ms. Bell's position, 1406, February 8, 2008.
5. Class Specifications for Customer Service Specialist 1.
6. Class Specifications for Customer Service Specialist 2.
7. Class Specifications for Customer Service Specialist 3.

C. Class Specifications

1. Class Specifications for Customer Service Specialist 1 (102A).
2. Class Specifications for Customer Service Specialist 2 (102B)
3. Class Specifications for Customer Service Specialist 3. (102C)