



STATE OF WASHINGTON
OFFICE OF FINANCIAL MANAGEMENT

STATE HUMAN RESOURCES DIVISION | DIRECTOR'S REVIEW PROGRAM
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February 4, 2015

TO: Connie Goff, PHR
Rules and Appeals Program Manager

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

SUBJECT: Shelly Bush v. Walla Walla Community College
Allocation Review Request ALLO-14-082

Director's Determination

This position review was based on the work performed for the six-month period prior to May 2, 2014, the date Ms. Shelly Bush's request for a position review was received by Walla Walla Community College's (WWCC) Human Resources Office (HR). This review was based on the written documents provided by Ms. Bush and by WWCC HR. A list of documents reviewed is attached. Based on my review and analysis of Ms. Bush's assigned duties and responsibilities, I conclude her position is properly allocated to the Program Coordinator, Class Code 107N.

Background

On May 2, 2014, Ms. Bush's submitted a Position Review Request (PRR) form to WWCC HR Office requesting that her position be reallocated from Secretary Senior to Program Specialist 2. (Exhibit B-2)

On July 10, 2014, WWCC HR notified Ms. Bush that her position was being reallocated from Secretary Senior (100T) to Program Coordinator (107N) effective May 2, 2014. (Exhibit B-1)

On August 1, 2014, the State HR Director's Review Program received Ms. Bush's request for a Director's review of WWCC's allocation determination. (Exhibit A-2)

By letter dated November 18, 2014, Ms. Bush submitted her revised written statement for her Director's Review request. A letter from Dr. Janet Danley, Director of the Clarkston Campus, supporting a reclassification for Ms. Bush's position was also attached. (Exhibits A-12 & 13)

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).

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.

Position Review Request (PRR)

The PRR date stamped May 2, 2014, indicates Ms. Bush's position reports to Katie Schultz, Office Manager. Ms. Bush indicates the Program Specialist 2 class better describe her duties. The Position Purpose states: "This key position provides support for the Clarkston Campus testing center as coordinator and proctor; provides support for the business office operations including course schedule building and maintenance; monitor and schedule facility and vehicle usage." Ms. Bush's duties and responsibilities are itemized as follows.

Time Responsibility as Testing Center Coordinator and Proctor

55%

- Coordinate testing center services and resources; act as liaison and provide consultation to participants regarding functions of the program. Interpret, review, and apply testing center specific policies, procedures, and regulations.
- Plan, organize, direct, coordinate and oversee day to day operations of the testing center; function as representative and resource, have extensive contact with program participants and outside entities and resolve problems within a delegated area of authority.
- Provide information and technical assistance to program participants, staff and administrators, regarding program content, policies and activities and recommends course of action.
- Confer with staff and outside entities regarding the interpretation of program procedures and policies.
- Monitor program activities in relation to established program goals.
- Provide training and prepare materials for program staff.
- Directs the work of others.

30% Support building and maintenance of the quarterly course schedule; facility and vehicle usage/scheduling

15% Backup Clarkston campus front office services and activities

On the Position Review Request, Ms. Bush answered the following questions:

Does your position have lead or supervisory responsibility? No

Do you have responsibility for maintaining fiscal records? No

Do you have responsibility for controlling or authorizing the expenditure of funds? No

The section labeled "Decision Making Authority" is left blank. This section says:

- "List examples of decisions you are authorized to make without consulting your supervisor.

- Indicate which of these decisions are the most difficult or complex.
- List examples of decisions that require approval." (Exhibit B-2)

Summary of Ms. Bush's Perspective

Ms. Shelly Bush indicated that she is confident that the correct classification of her position is Program Specialist 2 rather than the Program Coordinator. She indicated that "The duties and responsibilities that she performs are all new duties, none of which were previously performed." (Exhibit A-1)

Ms. Bush provided a "Revised Statement for Allocation to Program Specialist 2". She indicates that the following duties are examples of tasks that meet the Class Series Concept of the Program Specialist 2. In part, she writes:

- ...I am responsible for coordinating a complex array of testing program services and applying intensive knowledge and skills applicable to the day to day operations of the testing center. I am responsible for independently coordinating the campus-wide testing program services... that require security, compliance, professionalism, and environment management.
- I have earned testing certifications with Pearson VUE (computer-based testing solutions); Compass (Computer Adapted Placement Assessment and Support services); Casas (Comprehensive Adult Student Assessment system) and ATI/TEAS (Test of Essential Academic Skills)
- I manage and provide discrete proctoring for ADA (Americans with Disabilities Act); exams for other higher education institutions. . . online courses and WWCC classroom tests.
- I insure compliance with intricate national and state standards for clients under the umbrella of Pearson VUE: GED Testing Service, the American College exams, Evaluation Systems, CDA Exam Council, National Recreation and Park Association, etc. I administer strict protocols regarding identification requirements, name matching guidelines, demographic changes, admissions data, exam events/results, breaks, personal items, etc. I adhere to client specific regulations regarding security and confidentiality of sponsor and candidate information.
- I guarantee compliance and maintain integrity of federal, state and institutional testing; interpret and apply program specific policies, procedures, and regulations; examine and disseminate updates to testing policies and procedures for all providers; manage exam registrations, admissions, delivery, and site protocols.
- I consult with testing center participants regarding rigorous standards and expectations; advise candidates on the consequences of misconduct; interpret and disseminate test scores and recommend future courses of action; confer with administrators, faculty and staff regarding program goals, policies, and regulations; and meet with outside entities regarding test center programs, procedure, and facilities. (Exhibit A-13)

Summary of Supervisors' Comments

On May 16, 2014, K. Schultz, and Janet Danley, signed the PRR Supervisor Portion indicating:

- "Yes, I agree completely with the employee's description of duties and responsibilities."
- Ms. Bush works under General Supervision. (Exhibit B-3)

A memo dated March 7, 2013 from Dr. Danley states, in part: "...Effective spring quarter 2013, the Clarkston Campus will launch our very own testing center model.the model can now be launched with the assignment of Shelly Bush as the lead for coordination and proctoring in the testing center..." (Exhibit B-9)

By letter dated Nov. 14, 2014, Dr. Danley supported Ms. Bush's reclassification appeal to Program Specialist 2. She noted Ms. Bush has taken full responsibility for establishing the protocol and procedures used in the testing center and for all testing outside of classrooms on campus. She stated that Ms. Bush "prepared to become a certified proctor for all of the third-party testing administered by the College..." (Exhibit A-12)

Organization Chart

The revised organization chart dated April 14, 2014 shows Ms. Shelly Bush in two positions:

- Secretary Senior, (50%); reporting to Office Manager Katie Schultz who reports to Dr. Janet Danley, Clarkston Center Director;
- Testing Center Coordinator, (50%); COMPASS, GED, & eCASAS, reporting to Ms. Carol Bennett, Student Services Coordinator, who reports to Dr. Janet Danley. (Exhibit B-4)

Summary of WWCC's Human Resources Comments

In a letter dated Nov. 25, 2014, Ms. Sherry Hartford, Human Resource Director, indicated, "...At the time of Ms. Bush's request for review, she was allocated as a Secretary Senior. Based on my review of her duties and responsibilities, I determined the appropriate allocation for her position is Program Coordinator."

Ms. Hartford continues: "As stated in her Review Request, Ms. Bush's position exists to serve as the testing center coordinator and proctor (60%); to provide support for the business office operations including class schedule building and maintenance (work generally performed by a Secretary Senior); monitoring and scheduling facility (rooms) and vehicle usage (also work generally performed by a Secretary Senior). . . . The testing centers on both campuses (Clarkston and WWCC main campus in Walla Walla) provide for the monitoring and administration of standardized placement, CED, CLEP and classroom exams. In addition to other duties, Ms. Bush coordinates the Clarkston campus testing center. The protocols for testing are established by the test companies. Ms. Bush is responsible for following those protocols and she explains and provides information on policies and procedures to students or potential students, and applies the rules and regulations to those who are taking exams. She facilitates the scheduling of exams, checks in students and verifies their identity, proctors exams, and reports results. She also explains the testing program to those outside of the organization. the Program Coordinator is the best fit for the nature of the work Ms. Bush is performing and is the best job class for the allocation of her position." (Exhibit B-19)

On July 10, 2014, Ms. Hartford sent a letter stating the results of Ms. Bush's position review request, in part: ".....During the audit I conducted of your work, I determined that you have been instrumental in implementing a dedicated testing center at the Clarkston campus. You have worked with individuals from the IT department and with testing company providers to ensure facility space and equipment needs met the necessary requirements. You have worked with the main campus Testing Coordinator to implement testing procedures that will provide integrity to the testing process. ...You have completed necessary training to become a certified Pearson test proctor and you are familiar with the testing protocols for the various tests administered in the testing center (GED, eCasas, Compass). You ensure proper testing protocols are followed; make sure proper payments for testing services have been made; and provide direction to the evening test proctor. ...the majority of your work time you coordinate the operation of the Clarkston testing program. You organize and perform the work using your knowledge and experiences specific to the testing program. You exercise independent judgment in interpreting and applying rules and regulations. You independently advise students, staff, program participants and/or the public regarding program content, policies, procedures and activities.

You select and/or recommend alternative courses of action and you have extensive involvement with students and faculty in carrying out the testing program activities. You also coordinate, schedule and monitor program activities to determine consistency with program goals. ... Based on my review, I have determined that the work you are performing most closely matches that described in the Program Coordinator job specification. Effective May 2, 2014, the date your request was received in the Human Resource Office, Your position will be reallocated to Program Coordinator (107N)...“ (Exhibit B-1, pgs. 5-6)

Comparison of Duties to Class Specifications

When comparing the assignment of work and level of responsibility to the available class specifications, the class series concept (if one exists) followed by definition and distinguishing characteristics are primary considerations. While examples of typical work identified in a class specification do not form the basis for an allocation, they lend support to the work envisioned within a classification.

Comparison of Duties to Program Specialist 2

Class Series Concept of the Program Specialist 2

Positions in this series coordinate discrete, specialized programs consisting of specific components and tasks that are unique to a particular subject and are separate and distinguished from the main body of an organization. Positions coordinate program services and resources; act as a program liaison and provide consultation to program participants and outside entities regarding functions of the program; interpret, review and apply program specific policies, procedures and regulations; assess program needs; and develop courses of action to carry out program activities. Program coordination also requires performance of tasks and application of knowledge unique to the program and not transferable or applicable to other areas of the organization.

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

Definition for Program Specialist 2

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

Comparison of Duties to Program Specialist 2

Ms. Bush performs discrete, specialized tasks that are unique to the WWCC Clarkston Testing Center. However, the Testing Center is not separate and distinguished from the main body of the organization as required by the Program Specialist 2 classification. Rather, as shown on the organization chart, the Testing Center is a component of Student Services. Ms. Bush performs tasks related to testing activities within the Testing Center. However, some of the testing

protocols and requirements are developed and established by outside testing entities such as Pearson Vue and Compass. (Exhibit B-4)

The Testing Center does not contain the depth or breadth of components and tasks encompassed by a program as required by the Program Specialist 2 class series concept. Program Specialist 2 classification is not the best fit for the duties and responsibilities assigned to Ms. Bush's position.

Comparison of Duties to Program Coordinator

Class Series Concept for the Program Assistant (107M) and Program Coordinator (107N)

Perform work requiring knowledge and experience that is specific to a program. Organize and perform work related to program operations independent of the daily administrative office needs of the supervisor. Represent the program to clients, participants and/or members of the public.

A program is a specialized area with specific complex components and discrete tasks which distinguish it from the main body of an organization. A program is specific to a particular subject. The specialized tasks involve interpretation of policies, procedures and regulations, budget coordination/administration, independent functioning and typically, public contact. Duties are not of a general support nature transferable from one program to another. Performance of clerical duties is in support of incumbent's performance of specialized tasks.

Definition for Program Coordinator

Coordinate the operation of a specialized or technical program.

Distinguishing Characteristics for Program Coordinator

Under general direction, perform work using knowledge and experience specific to the program.

- Exercise independent judgment in interpreting and applying rules and regulations
 - Independently advise students, staff, program participants and/or the public regarding program content, policies, procedures and activities; select/recommend alternative courses of action and either:
 - Project, monitor, maintain, initiate and/or approve expenditures on program budgets
- OR**
- Have extensive involvement with students, staff, the public and/or agencies in carrying out program activities, and coordinate, schedule and monitor program activities to determine consistency with program goals.

Ms. Bush's position has primary responsibility for the WWCC Clarkston Testing Center's daily activities. She coordinates and provides direct technical support for the testing activities. She independently uses her specialized knowledge of the established protocols, processes and procedures to carry out daily technical support activities. She acts as a resource for the Testing Center in coordinating and processing daily work flow activities needed to carry out the Testing Center activities for the students and others taking the tests. She follows established testing protocols and procedures developed and required by instructors or outside testing companies. She schedules testing and follows identification and other procedural requirements for test takers.

Ms. Bush independently advises students, staff, and program participants regarding the testing processes and procedures. Ms. Bush has become a certified proctor for some outside testing

organizations. Ms. Bush serves as a liaison and provides consultation to testing participants and outside entities regarding the functions and content of the Testing Center. She contacts program participants and outside entities to resolve problems. Ms. Bush provides program information and details required of participants in testing, such as identification requirements, schedules, and other protocols.

Ms. Bush also provides support to the Clarkston Campus business office by scheduling room assignments and reservations and coordinating the motor pool reservation, maintenance, and usage procedures. Ms. Bush also serves as a backup to the Bookstore as a resource to those needing assistance or have questions.

On a best fit basis, the majority of Ms. Bush's overall level of responsibility and assigned duties for coordinating the WWCC Clarkston Testing Center's activities are encompassed within the Program Coordinator classification.

It is evident that Ms. Bush's position performs a variety of testing transactions with multiple protocols, rules and requirements and she has a solid understanding of the testing programs. However, a position's allocation is not based on an evaluation of performance. Nor does a position's allocation diminish the quality of work performed and is not a reflection of performance. Rather, it is based on the majority of work assigned to a position and how that work best aligns with the available job classes. Overall, the scope of duties and level of responsibility assigned to Ms. Bush's position best fit the Program Coordinator classification.

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 3rd floor of the Raad Building, 128 10th Avenue SW, Olympia, Washington. The main telephone number is (360) 407-4101, and the fax number is (360) 586-4694.

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

Cc: Shelly Bush
Sherry Hartford, WWCC, Human Resource Director
Lisa Skriletz, SHR

Enclosure: List of Exhibits

A. Shelly Bush Exhibits

1. Request for Review Cover Letter dated 7/29/14 (4 pages, pg 1-4)
2. Request for Director's Review dated 7/24/14 (2 pages, pg 5-6)
3. Position Review Decision Letter dated 7/10/14 (7 pages, pg 7-13)
4. Position Review Request Employee Portion (3 pages, pg 14-16)
5. WWCC Organizational Chart 2013-2014 (1 page, pg 17)
6. Position Review Request Supervisor Portion (2 pages, pg 18-19)
7. Class Specification- Secretary Senior (2 pages, pg 20-21)
8. Class Specification- Program Assistant (2 pages pg22-23)
9. Class Specification- Program Coordinator (1 page, pg 24)
10. Class Specification- Program Specialist 2 (2 pages, pg 25-26)
11. Employee Statement (1 page, pg 27)
12. November 14, 2014 letter of support from Janet V. Danley
13. Revised Employee Statement November 18, 2014 final argument

B. Walla Walla CC Exhibits

1. Allocation determination letter dated 7/10/14 (7 pages: pgs 1-7)
2. Position Review Request Employee Portion (3 pages: pgs 8-10)
3. Position Review Request Supervisor Portion (2 pages: pgs 11-12)
4. Organizational Chart, Clarkston Campus (1 page: pg 13)
5. Class Specification – Secretary Senior (2 pages: pgs 14-15)
6. Class Specification – Program Assistant (2 pages; pgs 16-17)
7. Class Specification – Program Coordinator (1 page: pg 18)
8. Class Specification – Program Specialist 2 (2 pages: pgs 19-20)
9. Email from Janet Danley dated 3/7/13 (1 page: pg 21)
10. Testing Announcement (1 page: pg 22)
11. Email from Shelly Bush dated 5/27/14 (1 page; pg 23)
12. Email from Carol Bennett dated 6/19/14 (1 page: pg 24)
13. Email from Shana Smith dated 3/21/14 (1 page: pg 25)
14. Email from Shelly Bush dated 3/6/14 (1page: pg 26)
15. Email from messenger@webex.com dated 1/21/14 (1 page: pg 27)
16. Testing Center Minutes dated 4/8/14 (1 page: pg 28)
17. Room Schedule dated 6/10/14 (1 page: pg 29)
18. Calendar 6/2014 (1 page: pg 30)
19. WWCC final argument November 25, 2014

C. Class Specifications

1. Secretary Senior
2. Program Assistant
3. Program Coordinator
4. Program Specialist 2