



**STATE OF WASHINGTON
OFFICE OF FINANCIAL MANAGEMENT**

STATE HUMAN RESOURCES DIVISION | DIRECTOR'S REVIEW PROGRAM
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August 11, 2015

TO: Connie Goff, PHR
Rules and Appeals Section Chief

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

SUBJECT: Fleetwood Wilson v. Seattle Community Colleges (SCC)
Allocation Review Request ALLO-15-026

DIRECTOR'S DETERMINATION

This position review was based on the work performed for the six-month period prior to October 30, 2014, the date Mr. Fleetwood Wilson's SCC Position Questionnaire for Classified Positions (PQ) was received by Employees Services (ES). As the Director's Review Investigator, I considered the documentation and information provided by the parties. Based on my review and analysis of Mr. Wilson's assigned duties and responsibilities, I conclude his position is correctly allocated to the Program Coordinator, Class Code 107N.

BACKGROUND

On October 30, 2014, Mr. Wilson submitted a Position Questionnaire form to Seattle CC Employees Services Office requesting that his position be reallocated from Program Coordinator to Program Specialist 2. (Exhibit B3)

On January 27, 2015, Mr. Daniel Cordes, of SC District Employees Services notified Mr. Wilson that his position was correctly allocated to Program Coordinator (107N). (Exhibit B-1)

On February 17, 2015, the State HR Director's Review Program received Mr. Wilson's request for a Director's review of Seattle CC ES' allocation determination. (Exhibit A-1)

On July 22, 2015, I conducted a review phone conference with the following:

Fleetwood Wilson, Employee;
Intee Topia, Representative, WFSE;
Daniel Cordes, Seattle College District Employee Services; and
Martin Logan, Human Resources Director, North Seattle College.

SUMMARY OF MR. WILSON'S PERSPECTIVE

Position Questionnaire (PQ)(Exhibit B-3)

The PQ indicates Mr. Wilson's position reports to Ms. Susan Shanahan, Director, Enrollment Support & Outreach. Mr. Wilson's duties and responsibilities are described as follows.

40% Coordinate New Student Enrollment

- Process admissions applications for new students
- Create admissions related documents
- Train and supervise part-time employees

40% Evaluate Students' Residency Status

- Evaluate residency applications /documents for tuition costs purposes
- Outreach for new students

10% Support Registration, Records & Credentials

- General customer service to current students, prospective students and general public

10% Train/Supervise Part-time Staff

- Assist with training/supervision of part-time staff to serve students via front counter/telephone for all ARRC procedures

Mr. Wilson indicated he believes the Program Specialist 2 is the correct allocation of his position. He indicated that he does the following work which he feels is outside his classification:

- Residency status evaluations for new & returning/continuing students
- Evaluate residency applications/documents for tuition costs purposes
- Supervision and training of part-time and hourly staff
- Records/transcripts support
- Outreach/recruitment support (5.5 years)
- Cross campus representation and coordination
- LDI (Leadership Development Initiative) Program
- Undocumented Students Advisory Committee
- Management Team Committee member

Mr. Wilson described the most difficult parts of his job as:

Evaluating residency status/applications/documents for non-US citizens (i.e. Permanent Residents with "Green" cards, former/recent International Students, and other eligible non-immigrant types.

Mr. Wilson described independent decisions he makes without first checking with his supervisor as follows:

- Evaluating residency status/ applications/documentation for former non-resident students including US citizen/non-WA residents, Permanent Resident "green" card holders, other eligible non-immigrant visa holders with documented state residency status, un-documented students, active duty military, and employees of higher education residency waivers.
- Assigning part-time/ work-study staff to provide student service via front desk/telephones.

After checking with his supervisor, Mr. Wilson indicates he makes these decisions:

- Assigning a part-time/ work-study staff member to a semi-permanent assistant position.
- Requesting for part-time/work-study staff to have access to special screens of the HP3000/ Secure 92SMS.

During the review conference, Mr. Wilson discussed his responsibilities for evaluating, determining and confirming the residency status of students. He indicated that he downloads information from enrollment databases that indicates those students who are non-residents. Other non-resident students may be referred from financial aid, international programs, or other units. Mr. Wilson contacts each student and explains the process to take the next steps to achieve residency status. He helps qualified students through that process. Mr. Wilson uses a variety of documents in establishing whether or not the student meets the eligibility for residency status. These include state and federal laws, guidebooks, college enrollment information and personal information from students.

Mr. Wilson indicated that about 40 to 70 students per quarter are referred to him for residency review. The residency review process includes reviewing all admission documents; communicating with a student in person or via email; advising the student of options; and assisting the student in completing necessary steps for residency. Achieving state residency reduces tuition costs for the student.

Mr. Wilson stated he participates in outreach activities and workshops on campus. During these events he interviews students, evaluates financial and other needs, and provides information.

Mr. Wilson commented that he is scheduled to work at the Registration Desk approximately 16 hours per week. His co-workers are also assigned at different times to work at the Registration Desk. During his scheduled time he provides customer service and has oversight responsibilities for 2 to 4 temporary employees and 5 to 7 student employees. He answers questions, provides directions and basic administrative support, and trains employees in downloading and processing the enrollment applications. Mr. Wilson confirmed that he does not hire, assign work schedules or do evaluations for student or temporary employees.

SUPERVISOR'S PERSPECTIVE (Exhibit B-3 pgs. 16-17)

Ms. Susan Shanahan, Director of Enrollment/Outreach and Mr. Wilson's supervisor, indicated on Part III of the PRR that she disagrees with the following statements made by Mr. Wilson.

- Mr. Wilson provides monthly orientations to college employees.
- Training a new employee in Mr. Wilson's role would take 1.5 years.

- Attending LDI is outside his job class; (comment: many program coordinators have attended.)
- Clarification: Supervision and training of hourly [employees] is a shared responsibility of all staff. Yes, he does perform this responsibility but is not the primary/sole supervisor.

Ms. Shanahan further indicated that she believes Mr. Wilson is performing work that is outside his current class: "Residency of currently enrolled students; specific data trends for quarterly enrollment and weekly/daily data reports of applied students and related conversation reports. This work was assigned August, 2014."

Ms. Shanahan indicated that she provides supervision for: "Admissions process updates/ requests, residency processes. New task assignments, biweekly support meetings to review tasks, working relationships, etc."

In Regards to Mr. Wilson's decision making authority, Ms. Shanahan indicated:

"He currently processes and approves residencies along with the Registrar/myself as backup; enrollment verification as appropriate, delegating to work-study/hourly student employees who support admissions processes."

HUMAN RESOURCES' PERSPECTIVE

In a letter dated January 27, 2015, Mr. Daniel Cordes, SCD Employee Services, indicated that the Program Coordinator best describes Mr. Wilson's work in admissions and the evaluation of students' residency status. He states, in part:

"A distinguishing characteristic of the Program Coordinator is that work requires the exercise of independent judgment in interpreting and applying rules and regulations within the specialized program. This description fits the work of creating new student records, updating and correcting SMS records, and the application of rules and regulations in assessing the residency status of students. From the written and oral evidence, it is clear that assessing residency status is a complex task, nonetheless the level of work is a good match for the distinguishing characteristics of the Program Coordinator.Based upon the evidence and this analysis, the Program Coordinator classification is the best fit for Mr. Wilson's work duties." (Exhibit B-1)

During the review conference, Mr. Cordes expressed appreciation for Mr. Wilson's patience and willingness to be active and engaged in the allocation process. He commented that Mr. Wilson does a sensitive and complex piece of work very well. Based on the classifications reviewed, Mr. Cordes indicated the majority of Mr. Wilson's work does not meet the Program Specialist 2 level. The Program Coordinator class is a better fit based on the type of work assigned to Mr. Wilson.

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.

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 has provided guidance for the requirements of the Program Specialist 2 class, as follows:

... the appellant performed discrete, specialized tasks that were unique to the Veterans Education Program. The Board further determined that the Veterans Education Program was not separate and distinguished from the main body of the organization but was a component of the Workforce and Education Department within Student Services Community Career and Employment Services. Therefore, the Board determined that the Veterans Education Program did not contain the depth or breadth of components and tasks encompassed by the Program Specialist class series concept. *Roney v. Spokane Community College*, PRB Case No. R-ALLO-09-030 (2009).

COMPARISON OF DUTIES TO PROGRAM SPECIALIST 2 (107I)

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.

For positions to be allocated to the Program Specialist 2, the duties and responsibilities must fall within the Class Series Concept. The Class Series Concept anticipates that positions allocated to this class will *"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."*

In reviewing the organization charts, Mr. Wilson's specific position reports to the Dean of Student Services, which reports to the Vice President of Student Services. His position and

one other position are both labeled as "Program Coordinator – Admissions & Registration". Mr. Wilson's position is not separate and distinguished from the main body of the organization; it is a component of the Admissions & Registration unit within Student Services. Therefore, Mr. Wilson's position does not contain the depth or breadth of components and tasks encompassed by the Program Specialist class series concept.

In addition, positions at the Program Specialist 2 level have independent responsibilities for planning, organizing, directing and coordinating program operations. Incumbents of Program Specialist 2 positions coordinate services and resources, assess program needs, and develop courses of action to carry out program functions and activities. Mr. Wilson's assigned responsibilities do not reach this level of independent responsibility. Mr. Wilson's level of authority does not include planning, organizing, and directing the operations of a program as a whole.

Overall, the assigned responsibilities of Mr. Wilson's position do not meet the breadth and depth of separation and distinction from the main body of the College as anticipated by the Program Specialist 2. Nor do his duties have the responsibility for "planning, organizing and directing" as anticipated by the Class Series Concept for the Program Specialist 2. The Program Specialist 2 is not a good match for allocation of Mr. Wilson's assigned responsibilities.

COMPARISON OF DUTIES TO PROGRAM COORDINATOR (107N)

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.

For a position to be allocated to the Program Coordinator, the assigned duties must meet the Class Series Concept found on the Program Assistant class as shown above.

The purpose of Mr. Wilson's position is particularly directed to assessing the residential status/requirements for non-residential students and providing assistance to student and temporary employees who work at the customer service desk. He uses independent judgement to determine how state guidelines, laws and rules are applied to non-residential students. Mr. Wilson's responsibilities are performed independently of the daily administrative office needs of his supervisor. He interacts with other employees, students, committee members and the public. He provides direct technical support specific to registration and admission processes. Mr. Wilson's assigned responsibilities are encompassed by the Class Series Concept for the Program Assistant/Coordinator classes. His position should be allocated within this series.

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.

Mr. Wilson's position has primary responsibility for the application of guidelines, WAC rules and RCW regulations in assessing residency status of students and to determine if residency is met. He reviews a non-resident student's admission documents to determine if the student is eligible for state residency. Mr. Wilson coordinates and processes activities specific to the needs of residency status evaluations for new, returning, and continuing students. Mr. Wilson participates on the Undocumented Students Advisory Committee.

Additionally, Mr. Wilson coordinates and provides direct technical support for student and temporary employees who perform registration and admission activities. During his assigned time at the admissions desk, he provides direction and makes assignments to student and temporary employees. He trains employees on assigned tasks including downloading student admission documents.

Overall, the majority of Mr. Wilson's responsibilities for coordinating activities for non-residential students to gain residency and providing direction for the admissions employees at the admissions desk are encompassed by the Definition and Distinguishing Characteristics of the Program Coordinator classification.

It is evident that Mr. Wilson's position performs a variety of residency review transactions with multiple protocols, rules and requirements and he has a solid understanding of the admissions programs. However, a position's allocation is not based on an evaluation 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. The scope of duties and level of responsibility assigned to Mr. Wilson's position are aligned with the expectations of the Program Coordinator classification. His position is appropriately allocated to the Program Coordinator.

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: Fleetwood Wilson, Employee, Seattle CC
Inti Tapia, WFSE, Representative
Daniel Cordes, Seattle College District Employee Services
Martin Logan, Human Resources Director, North Seattle College

Enclosure: List of Exhibits

FLEETWOOD WILSON v Seattle CC
ALLO-15-026

A. Fleetwood Wilson Exhibits

1. Director's Review Form received February 17, 2015 (3 pages)
2. Reallocation Application: Program Specialist 2
3. Re-classification Application/Daily Work Flow Summary
4. SCC Position Questionnaire
5. Program Specialist 2 classification specification

B. SCC Exhibits

1. January 27, 2015 Determination of Position
2. Re-Classification Application / Daily Work Flow Summary
3. Position Questionnaire for Classified Positions – 10/30/2014
4. Fleetwood Wilson's Re-Allocation Application: RE: Program Specialist 2
5. Glossary of Classification Terms
6. North Seattle College Registration Organizational Chart
7. Fleetwood Wilson Job Description – Completed 8/5/2005
8. Fleetwood Wilson Updated Job Description – submitted unsigned 12/1/2014
9. Marlene Enriquez-Campos, Assistant Registrar at Seattle Central, Job Description
10. Marilyn Anderson-Burt, Program Manager A at South Seattle, Job Description

C. Class Specifications

1. Program Coordinator (107N)
2. Program Specialist 2 (107I)