



**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 Program Manager

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

SUBJECT: Rosanna Schlagel v. Centralia College (CC)  
Allocation Review Request ALLO-14-092

**DIRECTOR'S DETERMINATION**

This position review was based on the work performed for the six-month period prior to July 8, 2014, the date Ms. Rosanna Schlagel's Position Review Request (PRR) was received by Centralia College's Human Resources Office. Based on my review and analysis of Ms. Schlagel's assigned duties and responsibilities, I conclude her position should be reallocated to the Office Assistant Lead classification.

**BACKGROUND**

On July 8, 2014, Ms. Schlagel's submitted a PRR form to the Human Resources Office requesting that her position be reallocated from Office Assistant 3 to Program Coordinator. (Exhibit A-4)

On August 18, 2014, Human Resources notified Ms. Schlagel that her responsibilities were reviewed and it was determined that her position is correctly allocated to the Office Assistant 3 classification. (Exhibit B-1)

On September 17, 2014, the State HR Director's Review Program received Ms. Schlagel's Request for a Director's Review of CC's allocation determination. (Exhibit A-1)

On June 17, 2015, a phone conference was held to review Ms. Schlagel's responsibilities. The following were participants in the phone conference:

Rosanna Schlagel, Employee  
Becky Stephens, Council Representative, WFSE  
Julie D. Ledford, V.P. for Human Resources and Legal Affairs, CC

On June 25, 2015, following the review conference, Ms. Schlager submitted an exhibit of email copies to support her involvement in issues regarding grades below 1.0. (Exhibit A-27) Exhibit A-27 duplicates the information in Exhibit A-20, pages 73 to 77.

### **POSITION REVIEW REQUEST (PRR) (Exhibit B-10)**

The PRR, date stamped July 8, 2014, indicates Ms. Schlager's position reports to Lucretia Folks, Interim VP for Student Services, and Dennis Bonner, Registrar.

During the review conference, Ms. Schlager clarified that her work time is divided among duties and responsibilities as follows, in part:

#### 12.9% Calendar and job scheduling

- Order, create, schedule, design, and distribute quarterly calendar and jobs to be in compliance with State Board for Community & Technical Colleges (SBCTC) regulations

#### 60.5% Enrollment and registration process

- Communicating with, coordinating enrollments for, monitoring payments for, registering, grading and coding for the: Teen Program, Centralia College East (CCE), International Programs, Bachelor of Applied Science Management (BASM), Adult Basic Education (ABE), HS 21+, English As A Second Language (ESL), Counseling Center and Advising, Continuing Ed (CE), Senior Education (SNRC), Child and Family Studies (CFS) and Cedar Creek Corrections Center Education Department

#### 11.5% SSN IRS compliance data

- Coding, tracking, mailing and updating student social security (SSN) information to be in compliance with IRS federal guidelines

#### 10.0 % ctcLink

- Subject Matter Expert for ctcLink in Student Services and Admissions and Records

#### 3.1% WR/WF/BFET coding

- Monitor, code, update and evaluate program coding for BFET, Worker Retraining and WorkFirst

#### 2.0% Additional duties not listed.

Ms. Schlager indicated she provides lead responsibilities for a full-time, permanent employee and a student employee who works 15 hours per week. She has trained one employee as a backup. She assigns and checks work, answers questions, and provides registration process training and feedback.

Ms. Schlager listed examples of her decision making authority as:

- Processing and cleaning up reports and ensuring grading policies are followed.
- Interpreting and applying rules and regulations.
- Advise students, staff, program participants and the public regarding program content, policies, procedures, activities and recommend alternative courses of action where appropriate.

Ms. Schlagel obtains prior approval for Granting Exception to the Refund or Grade Forgiveness forms which require the Registrar's signature. She ensures all necessary forms are filled out and necessary documentation is provided prior to presenting the paperwork to the Registrar.

Ms. Schlagel believes that Program Coordinator is the correct classification for her position. She wrote, in part:

"I handle complex, cross agency customer problems. I have extensive knowledge of and experience with using the SMS system... I mentor my coworkers ... as I have extensive technical experience and knowledge of policies. I wrote a 100 plus page manual which explains and shows step by step how to enter biographics, process registrations, build and maintain courses, plan annual academic calendar, schedule and order jobs for the State Board... I troubleshoot reporting, computer programs, data coding and registration concerns. I am assigned as Subject Matter Expert ...so I am involved in preparation and training for *ctcLink* implementation. Finally, I provide customer service to students, faculty, staff, and other agencies ...." (Exhibit B-10 pg. 29)

During the review conference, Ms. Schlagel confirmed she works in the Admissions and Records Unit, within Student Services, at Centralia College. She provides customer service to students, faculty, and staff. She stated she coordinates student enrollments and monitors payments for classes. She is responsible for helping students register for classes. Ms. Schlagel is knowledgeable about and provides assistance for specialized registration processes for different groups of students such as veterans, new and returning students, foreign students or attendees at the Garret Heyns or Cedar Creek Education Centers.

Ms. Schlagel provides information to a variety of external clients such as Labor & Industries counselors, lawyers, and Education Centers' staff regarding policies and processes. For example, if a student needs to withdraw for medical reasons, she explains the medical withdrawal process to the student/student's representative.

Ms. Schlagel stated she participates in campus committees and groups such as the Worker Retraining Advisory Committee, Advising Steering Committee, Calendar Committee, Data and Research Team, and *ctcLink* conversion.

### **SUMMARY OF SUPERVISOR'S PERSPECTIVE**

On June 26, 2014, Lucretia Folks, supervisor and Student Services Vice President, signed the PRR. Ms. Folks indicated she agrees completely with Ms. Schlagel's description of duties and responsibilities, the position purpose, work activities, lead responsibilities and decision making authority. Ms. Folks indicates Ms. Schlagel works under general direction.

### **SUMMARY OF HUMAN RESOURCES' PERSPECTIVE**

In a letter dated August 18, 2014, Ms. Julie D. Ledford, Vice President for Human Resource and Legal Affairs, stated that she had reviewed Ms. Schlagel's position and found it was appropriately allocated to the Office Assistant 3. Ms. Ledford stated, in part:

"...The key basis for this determination is that a significant number of your duties do not align with the Program Coordinator position. Specifically, this position does not coordinate the operation of a specialized or technical program. Despite assisting in the coordination of

reports and records and playing an integral role in the registration and admissions process on campus, this does not correlate to the coordination of a program." (Exhibit B-1)

Ms. Ledford provided background information regarding Ms. Schlagel's position's history. Additionally, she described her discussions with others during the review process of Ms. Schlagel's position. (Exhibit B-17)

During the review conference, Ms. Ledford indicated she talked with Ms. Schlagel's supervisor who indicated that information comes to Ms. Schlagel for processing. Ms. Ledford noted that the quarterly academic calendars are consistent with the 5<sup>th</sup> and 10<sup>th</sup> days of the quarter – registration of students is set to those dates. Ms. Ledford indicated the only official record of Ms. Schlagel being assigned lead or supervisory duties is the Position Review Request documentation.

## **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 the Definition and Distinguishing Characteristics are primary considerations. While examples of Typical Work identified in a class specification do not form the basis for an allocation, they lend support to the work envisioned within a classification.

The 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).

## **Glossary of Classification Terms**

The *Glossary* provides guidance for classification of positions. The *Glossary* is on the web at: [http://www.hr.wa.gov/sitecollectiondocuments/compensationandjobclasses/comp\\_class\\_hr\\_pro\\_tools/classificationglossary.doc](http://www.hr.wa.gov/sitecollectiondocuments/compensationandjobclasses/comp_class_hr_pro_tools/classificationglossary.doc)

The following definition is pertinent to Ms. Schlagel's position review request.

### **Lead**

An employee who performs the same or similar duties as other employees in his/her work group and has the designated responsibility to regularly assign, instruct, and check the work of those employees on an ongoing basis.

## **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.

## **Program Coordinator**

### **Definition**

Coordinate the operation of a specialized or technical program.

For a position to be allocated to the Program Coordinator, the position's responsibilities must match the Class Series Concept and the Definition.

Although Ms. Schlagel's delegated responsibilities involve handling complex enrollment and registration issues, overall, the nature and focus of Ms. Schlagel's assignments do not reach to the level of *"coordinate the operation of a specialized or technical program"* as anticipated by the Class Series Concept of the Program Coordinator class. Rather, the primary focus of Ms. Schlagel's position is to provide customer service and support for student enrollment and registration services.

This focus is detailed in Ms. Schlagel's description of Position Purpose:

To provide excellent customer service to students, staff and faculty. I'm the go to person for reports submitted to SBCTC and in resolving complicated registration, advisor, coding, programming, grading, scheduling, and planning issues. To train and mentor staff how to use the SMS system, resolve student or staff system related issues, run reports, run jobs, register students, maintain demographic data, coding, and data clean-up in preparation for *ctcLink* transition. To have extensive involvement with students, staff, the public and/or agencies in carrying out Admissions and Records activities; coordinate, schedule and monitor program jobs; and ensure guidelines or regulations are being followed. (Exhibit B-10, pg. 30)

Ms. Schlagel's position's focus, duties and responsibilities do not align with the level of responsibility anticipated by the Class Series Concept and the Definition of the Program Coordinator class. Rather, Ms. Schlagel's position's purpose is to support and provide customer service to students, staff and faculty and resolve complicated problems in registration, advising, coding and other areas. The focus of her position does not match the anticipated scope of the Program Coordinator class. The Program Coordinator class is not the best fit for allocation of Ms. Schlagel's position.

## **COMPARISON OF DUTIES TO OFFICE ASSISTANT LEAD CLASSIFICATION (100K)**

### **Class Series Concept is shown on the Office Assistant 1 class (100H)**

Performs a variety of clerical duties in support of office or unit operations.

As described in the purpose of her position, Ms. Schlager performs a variety of complex clerical responsibilities in support of Enrollment Services operations at Centralia College. The focus and responsibilities of her position, fit within the Class Series Concept for the Office Assistant Series.

### **Definition**

As a unit's designated lead worker, assigns, instructs and checks the work of lower level office support staff, plans and organizes work, and performs a variety of complex clerical projects and assignments such as establishing and revising electronic or manual record keeping systems including data base files, monitoring and evaluating financial records and/or documents, resolving clerical problems, responding to inquiries regarding policies, procedures, and services, drafting correspondence, compiling reports, and reviewing, screening, verifying, and evaluating applications, forms, or requests for information.

Duties performed require substantive knowledge of a variety of regulations, rules, policies, procedures, processes, materials, or equipment.

### **There are no Distinguishing Characteristics for this class.**

Ms. Schlager's delegated responsibilities and the nature and focus of her assignments are aligned with the level of designated lead duties and complex office support responsibilities anticipated by the Class Series Concept and the Definition of the Office Assistant Lead class. For example, the PRR Supervisor Portion confirms that Ms. Schlager is delegated lead duties; the Supervisor Portion is signed by her supervisor and second-level supervisor. (Exhibit B-10 pg. 35)

Further, in keeping with the Definition, Ms. Schlager performs a variety of complex clerical projects and assignments such as monitoring billings, updating coding, processing Grade Forgiveness requests and completing Exception to the Refund paperwork. She is designated as the Subject Matter Expert for *ctcLink*. She develops tracking methods and makes entries for SSNs in accordance with IRS requirements. She creates and implements grading policies for GHEC and Cedar Creek and has written a training manual for these Centers. She provides ongoing technical support and training to GHEC staff. Additionally, she coordinates deadlines and processes information for the Instruction Office, Financial Aid, Cashiering, Business Office and others. Ms. Schlager coordinates enrollments, monitors payments and communicates with several areas of campus including Teen Program, Centralia College East, International Programs, and Adult Basic Education.

Overall, Ms. Schlager's position's duties and responsibilities are aligned with the anticipated responsibilities of the Class Series Concept and the Definition of the Office Assistant Lead class. Ms. Schlager's position responsibilities are a match for the expected complexity of work and focus of this classification.

Although the examples of Typical Work do not form the basis for an allocation, they lend support to the scope and level of work performed by this class. The Typical Work statements that most closely line up with Ms. Schlager's duties include the following, in part:

### **Typical Work**

- Regularly assigns, instructs and checks the work of others as a significant portion of overall delegated responsibilities; provides input to supervisor(s) on employees' performance;
- Performs the duties of Office Assistant 3;
- May use computer to compile data; review computer printouts for accuracy and completeness; review and assign codes given to data, for data entry purposes;
- May tabulate numerical data from information provided and prepare numerical summaries, organizational charts, work flow charts and graphs;

It is evident that Ms. Schlagel is a respected employee who performs a variety of enrollment transactions with multiple protocols, rules and requirements and has lead responsibilities. 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, an allocation is based on the majority of work assigned to a position and how that work best aligns with the available job classes.

Overall, Ms. Schlagel's assigned responsibilities closely reflect the expected level of lead assignment, complexity of work and independent resolution of inquiries regarding policies, procedures and clerical issues of the Office Assistant Lead class. Ms. Schlagel's position should be reallocated to the Office Assistant Lead 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 3<sup>rd</sup> floor of the Raad Building, 128 10<sup>th</sup> 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: Rosanna Schlagel, Employee  
Becky Stephens, Representative, WFSE  
Julie Ledford, Vice President for Human Resources and Legal Affairs, CC

Enclosure: List of Exhibits

**ROSANNA SCHLAGEL v CENTRALIA COLLEGE**

**ALLO-14-092**

A. Rosanna Schlager Exhibits

1. Request for Director's review p. 1 – 4
2. Letter of Appeal p. 5 – 8
3. Term Definitions p. 9
4. Position Review Request (employee portion) p. 10 – 15
5. Email chain re: SBCTC p. 16 – 17
6. Position Review Request (supervisor portion) p. 18 – 19
7. Class Specification/OA3 p. 20
8. Class Specification/Program Coordinator p. 21
9. Centralia College Response to Reallocation Request p. 22 – 23
10. Centralia College Position Description/OA3 p. 24 – 26
11. Position Review Request (updated) p. 27 - 32
12. Letter in Response to HR Exhibit Cover Letter p. 33 – 38
13. Letter from Nita Taylor p. 39 – 40
14. Glossary of Classification Terms p. 41 – 42
15. CTC Link Glossary p. 43
16. CTC Link College Team Roles p. 44 – 46
17. CTC Link Organization Chart p. 47 – 48
18. Email Chain re: CTC Link Participants p. 49 – 50
19. Email Chain/Work Product re: 1098T p. 51 – 58 (research & policy work)
20. Email Chain/Work Product re: Decimal Grades p. 59 – 78 (research & policy work)
21. Email Chain/Work Product re: Z Grades p. 79 – 85 (research & policy work)
22. Email Chain/Work Product re: Withdrawal p. 86 – 90 (research & policy work)
23. Email Chain/Work Product re: Minimum Passing Grades in SMS p. 91 - 96

B. Centralia College Exhibits

1. August 18, 2014 CC allocation determination letter
2. Rosanna Schlager's Office Assistant 3 Position Description
3. Enrollment Services Organizational Chart
4. Student Services
5. Centralia College Organizational Chart
6. Office Assistant 3 Class Specification
7. Program Coordinator Class Specification
8. Christine Jones' Program Support Supervisor 1 Position Description
9. Previous Office Assistant Lead's Position Description
10. Position Review Request July 8, 2014
11. Rosanna Schlager's letter to the Director of State HR seeking review
12. Office Assistant 1 Class Specification
13. Office Assistant 2 Class Specification
14. Office Assistant Lead Class Specification
15. Program Assistant Class Specification

16. CC final response

C. Class Specifications

1. Office Assistant 1 (100H)
2. Office Assistant 2 (100I)
3. Office Assistant 3 (100J)
4. Office Assistant Lead (100J)
5. Program Assistant (107M)
6. Program Coordinator (107N)