

**BEFORE THE PERSONNEL RESOURCES BOARD  
STATE OF WASHINGTON**

BRANDON REED,

Appellant,

vs.

THE EVERGREEN STATE COLLEGE,

Respondent.

CASE NO. R-ALLO-15-007

ORDER OF THE BOARD  
FOLLOWING HEARING ON  
EXCEPTIONS TO THE  
DETERMINATION OF THE DIRECTOR

**Hearing on Exceptions.** This appeal came before the Personnel Resources Board, NANCY HOLLAND YOUNG, Chair; SUSAN MILLER, Vice Chair; and VICKY BOWDISH, Member, for a hearing on Appellant's exceptions to the director's determination dated April 16, 2015. The hearing was held on July 8, 2015.

**Appearances.** Appellant Brandon Reed was present and represented himself. Respondent The Evergreen State College (TESC) was represented by Sharon Storer, Assistant Director for Human Resource Services.

**Background.** Appellant requested reallocation of his Fiscal Specialist 1 position on January 27, 2014 by submitting a Position Review Request (PRR) to TESC's Human Resources (HR). In his PRR, Appellant request reallocation to a Financial Aid Systems Coordinator position, the Information Technology Specialist 3 classification or an Assistant Manager position.

By letter dated March 27, 2014, TESC notified Appellant that his position was reallocated to the Forms and Records Analyst 3 classification. On May 13, 2014, Appellant requested a director's review of TESC's determination.

By letter April 16, 2015, the director's designee determined that Appellant's position should be reallocated to the Fiscal Specialist 2 classification.

1 On April 30, 2015, Appellant filed timely exceptions to the director's determination. In his  
2 exceptions, Appellant indicates that his title and salary have not been equitable to the technical  
3 duties added to his position. Appellant's exceptions are the subject of this proceeding.

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5 Appellant works in the Student Financial Office within the Business Services Division at TESC.  
6 As summarized in the director's determination, Appellant is responsible for "accounts receivable  
7 and accounts payable that flow through the Student Financial Services office. Mr. Reed serves as  
8 the expert in the use of the Banner and CashNet technology systems for the office. Mr. Reed uses  
9 the systems to retrieve information, analyze, research, and develop efficiencies to assist the  
10 Student Financial Services Manager in saving the college money. Mr. Reed provides customer  
11 service and accounting functions associated with student and non-student receivables." In  
12 addition, Appellant provides direction to office staff and assists staff in other departments on  
13 campus who work with accounts receivables and payables using the Banner and CashNet systems.

14  
15 **Summary of Appellant's Arguments.** Appellant argues that he is the point person for the CashNet  
16 system and that he provides assistance to multiple offices and departments in regard to the flow of  
17 funds into and out of the CashNet system. Therefore, Appellant contends that his position has  
18 campus wide impact. Appellant asserts that the responsibilities of his position have morphed into  
19 more technology related responsibilities. Appellant argues that he performs application testing,  
20 business analysis, process reengineering, and process documentation when systems are upgraded or  
21 issues arise to assure that the accounts receivable module of the system is not negatively affected.  
22 Appellant explains that similar positions at TESC and other state higher education institutions are  
23 allocated to a variety of classes including fiscal specialists, forms and records analysts, information  
24 technology specialists, and various management and exempt positions. Appellant contends that  
25 based on the technology aspects of his duties and responsibilities, his position should be reallocated  
26 to the Information Technology Specialist 3 classification.

1 **Summary of Respondent's Arguments.** Respondent argues that they reviewed whether  
2 Appellant's position should be exempt but determined that the position did not meet the exemption  
3 criteria. Therefore, Respondent considered the Information Technology Specialist classes, the Forms  
4 and Records Analyst classes and the Fiscal Specialist classes. Respondent determined that the Fiscal  
5 Specialist classes did not encompass Appellant's responsibilities in regard to providing direction to  
6 other system users, controlling the data input and output from the system, and overseeing the setup  
7 of the system for accounts receivable and payable. Respondent further determined that Appellant's  
8 position did not have the responsibility for the system technical issues but rather functioned as a  
9 super-user while the Computing and Communications office was responsible for system technology;  
10 therefore, the Information Technology classes did not provide the best fit for his position.  
11 Respondent concluded that the Forms and Records Analyst 3 (FRA3) classification provided the  
12 best fit for Appellant's position because this class encompassed positions that function as specialists  
13 in two or more systems, utilize electronic forms and records, consult on system problems and  
14 oversee the work of staff. Respondent asserts that the majority of Appellant's work includes  
15 responsibility for the Banner and CashNet systems including electronic forms and templates, and  
16 training staff on the use of the systems which best fits within the FRA3 class.

17  
18 **Primary Issue.** Whether the director's determination that Appellant's position should be reallocated  
19 to the Fiscal Specialist 2 should be affirmed.

20  
21 **Relevant Classifications.** Fiscal Specialist 2, class code 151F, Information Technology Specialist 3,  
22 class code 479K; and Forms and Records Analyst 3, class code 112K.

23  
24 **Decision of the Board.** The purpose of a position review is to determine which classification best  
25 describes the overall duties and responsibilities of a position. A position review is neither a  
26 measurement of the volume of work performed, nor an evaluation of the expertise with which that  
27 work is performed. A position review is a comparison of the duties and responsibilities of a  
28 particular position to the available classification specifications. This review results in a

1 determination of the class that best describes the overall duties and responsibilities of the position.  
2 See *Liddle-Stamper v. Washington State University*, PAB Case No. 3722-A2 (1994).

3  
4 Appellant argues, in part, that the duties and responsibilities of his position are similar to other  
5 higher-level positions at TESC and other higher education institutions within the state. This Board  
6 and its predecessor, the Personnel Appeals Board, have addressed this issue numerous times. In  
7 *Byrnes v. Dept's of Personnel and Corrections*, PRB No. R-ALLO-06-005 (2006), this Board  
8 determined that “[w]hile a comparison of one position to another similar position may be useful in  
9 gaining a better understanding of the duties performed by and the level of responsibility assigned to  
10 an incumbent, allocation of a position must be based on the overall duties and responsibilities  
11 assigned to an individual position compared to the existing classifications. The allocation or  
12 misallocation of a similar position is not a determining factor in the appropriate allocation of a  
13 position.” Citing to *Flahaut v. Dept's of Personnel and Labor and Industries*, PAB No. ALLO 96-  
14 0009 (1996). Therefore, the allocation of other positions is not a determining factor in the proper  
15 allocation of Appellant’s position.

16  
17 In his exceptions, Appellant asserts that the title and salary of his position have not been equitably  
18 adjusted. However, salary inequity is not an allocating criterion and should not be considered  
19 when determining the appropriate allocation of a position. *Sorensen v. Depts. of Social and Health*  
20 *Services and Personnel*, PAB Case No. A94-020 (1995).

21  
22 In a broad context, the tasks Appellant performs may fit into the Information Technology  
23 Specialist classes. As technology advances and many tasks that were once performed by  
24 technicians become computerized, many functions and disciplines utilize computers to perform  
25 tasks that were once performed using less computerized processes. However, this does not change  
26 the purpose or nature of the work being performed. Rather, only the tools being used and the  
27 processes necessary to employ those tools have changed. *Granum v. Department of Corrections*,  
28 PRB Case No. R-ALLO-15-004 (2015).

1 The Information Technology Specialist class series is not intended to encompass positions that  
2 perform information technology-related work to accomplish tasks but are non-technical in nature.

3  
4 Here, as in *Granum*, Appellant uses computerized functions to perform tasks that were once  
5 performed using less computerized processes. However, the purpose and nature of Appellant's  
6 work has not changed. We agree with the director's determination that Appellant's position does  
7 not meet the intent of the Information Technology Specialist class series. While he does perform  
8 "some information technology related tasks such as ensuring the interface between CashNet and  
9 Banner are functioning properly, ensuring that the system coding is accurate so that the money  
10 goes to the correct accounts, and establishing billing documents in E-vision." The primary  
11 purpose of Appellant's "position is not to perform information technology systems or applications  
12 support but to ensure the systems are in place to carry out the financial functions of the Student  
13 Financial Services section." See director's determination ALLO-14-043 page 5.

14  
15 The definition for Forms and Records Analyst 3 classification states:

16       Positions at this level are specialists in two or more system areas such as financial  
17 records, student records, resident records, and/or health records, or function as a  
18 management consultant for complex manual and/or electronic forms and/or records  
19 problems, or provide management consultation and determinations on responses to  
20 public record requests. Incumbents may oversee the work of subordinate staff and  
21 coordinate the day-to-day delivery, distribution, access, maintenance and retention  
22 of manual and/or electronic forms and/or records.

23 While in a broad sense, Appellant's duties fit the Forms and Records Analyst 3 definition, this  
24 classification does not encompass the fiscal purpose and nature of his position. Appellant is a  
25 specialist in student **financial** records and conducts other **financial** recordkeeping tasks as they  
26 relate to Banner and CashNet. He is not a specialist in financial records or student records as a  
27 whole. In addition, while not allocating criteria, the typical work statements for the FRA3 class  
28 provide guidance on the type of work typically performed by positions allocated to this class.  
29 Appellant's position is not responsible forms and records management services and functions

1 described in the typical work statements of the FSA3 class. The FSA3 class does not provide the  
2 best fit for the overall nature and purpose of Appellant's position.

3  
4 The class series concept for the Fiscal Specialist classes states:

5 Provide administrative support to administrator or manager in line with the fiscal  
6 and/or business management. Apply principles of financial management to perform  
7 such functions as record keeping, auditing, analysis, budgeting, payroll, travel,  
8 purchasing and other types of fiscal operations.

9 The definition for the Fiscal Specialist 2 class states:

10 Under general direction, perform a variety of complex and varied fiscal  
11 administrative support functions such as analyzing and developing budgets for  
12 grants, contracts, state funds, and/or program funds, establishing and maintaining  
13 comprehensive fiscal recordkeeping systems, analyzing, establishing and  
14 maintaining cost center and/or self-sustaining accounts, maintaining professional  
15 fee records and coordinating unit-wide fiscal support functions such as payroll,  
16 travel reimbursement, purchasing and fiscal planning. Positions at this level  
17 typically function in support of units with diverse activities such as research,  
18 teaching, patient care, and community service programs.

19 We agree with the director's determination that the nature and scope of Appellant's duties and  
20 responsibilities are consistent with establishing and maintaining comprehensive recordkeeping  
21 systems and analyzing, establishing and maintaining cost center or self-sustaining accounts to  
22 ensure the accurate and timely completion of fiscal duties for the Student Financial Services unit.  
23 In addition, Appellant's position applies principles of financial management and provides support  
24 to diverse activities campus-wide. The Fiscal Specialist 2 classification provides the best fit for  
25 the overall functions, level and scope of responsibility, and purpose of Appellant's position.

26 The best fit concept is used when for lack of a better fit, the duties and responsibilities of a  
27 position do not encompass the full breadth of the duties and responsibilities described by the  
28 classification but the classification best describes the level, scope and diversity of the overall  
29 duties and responsibilities of the position. See for example, *Salsberry v. Washington State Parks*

1 *and Recreation Commission*, PRB Case No. R-ALLO-06-013 (2007) and *Allegrì v. Washington*  
2 *State University*, PAB Case No. ALLO-96-0026 (1998).

3  
4 The scope of duties and level of responsibilities assigned to Appellant's position best fit the  
5 scope, intent and level of responsibility found in the Fiscal Specialist 2 classification.

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7 In a hearing on exceptions, the appellant has the burden of proof. WAC 357-52-110. Appellant  
8 has failed to meet his burden of proof.

9 **ORDER**

10 NOW, THEREFORE, IT IS ORDERED that the appeal on exceptions by Brandon Reed is denied  
11 and the director's determination dated April 16, 2015, is affirmed.

12 DATED this \_\_\_\_ day of \_\_\_\_\_, 2015.

13 WASHINGTON PERSONNEL RESOURCES BOARD

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16 \_\_\_\_\_  
17 NANCY HOLLAND YOUNG, Chair

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19 \_\_\_\_\_  
20 SUSAN MILLER, Vice Chair

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22 \_\_\_\_\_  
23 VICKY BOWDISH, Member