

**APPEAL OF POSITION CLASSIFICATION FOR EMPLOYEES COVERED
BY UWOSA COLLECTIVE AGREEMENT
(Reference Collective Agreement Article 44)
Attention: Job Evaluation Appeals Committee**

(A) Contact Information:

Name of person requesting appeal: Angela Gallienne
Title: Alumni Relations & Development Assistant
Phone: 86237
Email: agallien@uwo.ca
Department: Alumni Relations & Development
Schulich Medicine & Dentistry

(B) Position Information:

Current Incumbent: Angela Gallienne
Current Classification: Secretary IV
Classification Being Appealed: Secretary IV
Date Evaluation Results Letter Received: Feb. 21, 2007

(C) Information Required For Job Evaluation Appeals Committee

Reason for the appeal: I believe if I were replaced the current job classification would not embody the scope, communication skills, event + project management required of this position.

Supporting Information (Optional):

(Attach an additional page if more space is required)

(D) Approvals:

Signature of Person Appealing: Angela Gallienne Date: Feb. 28, 2007

The appellant shall send one copy of the material to Human Resources and one copy to JEAC c/o UWOSA.

UWOSA JOB EVALUATION RECORDING FORM

Office Support Plan

(APPEAL)

Dept: Alumni Relations
Dept. Num.
Incumbent: Angela Gallienne
Citte Mem.Present: UWOSA: J. Millette, M. Parker,
 ADMIN: C. Bumbacco, C. Zrini

Job Title:

Eval. Date:

	FACTOR	COMMENTS	SUB FACT	DEGREE	PTS	Profile		
						-	=	+
I	Job Knowledge	No minimum education requirement. Cyclical role required one year on the job learning. 3 years previous experience required	Educ	2	105			
			Exper.	G				
II	Initiative	Generally regulated. Functionally independent. Details left to the employee. Operates within established procedures		3	35			
III	Complexity/Judgement	Choice of action within limits that are well defined		3	25			
IV	Contacts	Routine contacts, not responsible for cultivating cooperation or approval		2	20			
V	Errors	Embarassment if events not properly planned or gifts not acknowledged		3	45			
VI	Supervision of Others	Work study student	Char.	A	10			
			Scope	2				
VII	Effort/Demands			2	30			
VIII	Physical Environment	Normal office environment		1	10			

CLASSIFICATION ASSIGNED

Total Pts: **280**

Group: _____

Level: _____ Salary Grade 9

Co-Chair Signatures: UWOSA: Mike Parker

ADMIN: Chris Bumbacco

POSITION DESCRIPTION QUESTIONNAIRE

THE UNIVERSITY OF WESTERN ONTARIO EMPLOYEE RELATIONS

U.W.O. ID NUMBER

20012696

PRESENT INCUMBENT

SURNAME

Gallienne

INITIALS

A.E.

POSITION IDENTIFICATION

DEPT. NO

P.S. JOB CODE

BASIC POSITION INFORMATION

DEPT. NAME Alumni Relations & Development

SECTION NAME _____

LOCATION CSB 3720

WORK WEEK HRS. 35

SUPERVISOR SURNAME O'Hagan

INITIAL J

PHONE 82247

FOR SALARY ADMINISTRATION USE

CLASS'N Admin Asst S.G.9

CLASS'D _____ EFFECT _____
Date Date

ANALYST _____

- 1) PLEASE LIST AND DESCRIBE YOUR MAJOR DUTIES WITH AN APPROXIMATE ANNUAL PERCENTAGE OF TIME SPENT ON EACH. USE SPECIFIC TERMINOLOGY PERTINENT TO THIS POSITION; PROVIDE EXAMPLES (E.G. TESTS, PROCEDURES, ETC.) AND CLARIFY YOUR INVOLVEMENT IN EACH DUTY (RE. SUPERVISE IT, DO IT, PARTICIPATE IN IT, ETC.)

NO.	MAJOR DUTIES	%
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10%	I update our website, database & wall calendar with call activity of Director and two development officers. Additionally update personal records on database with development officer assignments, projected asks, call reports, actions and contact information. I also maintain the electronic calendars of my director and two development officers.	
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DATA ENTRY

For the projected asks, I update our database for the purpose of a 'gifts to close' report, which I run bi-weekly. The 'gifts to close' report drives the fundraising activities of the team. It includes major gift donors that will be solicited in the fiscal year, the proposed project and giving amount. It is my responsibility to ensure the report is accurate.

12% Direct **student fundraising initiatives** through guidance, planning, appeal database, edit letter, create complete mailer with pledge forms and return envelopes, supplier contact, process gifts, record gifts on custom database to track appeal success, ensure donor thank-you's sent upon student's return. (Appeals sent February, donations arrive Mar – July, students travel in June, thank-you's sent October, introduced to new group November)

STUDENT INITIATIVES

I am the point of contact for Student Initiatives. Each November I meet with three newly formed student fundraising groups:

MedOutreach, consisting of seven students from medicine, dentistry and nursing, raising funds to go to Africa in the summer.

Medical Students Initiative China, consisting of four students from medicine raising funds to go to China in the summer.

India Health Initiative, consisting of four students from medicine raising funds to go to India in the summer.

I first ask them to send a thank you letter to the previous year's donors. I provide them with this list of donors, from a custom report that I designed in conjunction with our Information Management team. If the groups require assistance I merge the data with their letter, print the letters and labels and provide them supplies for the mailer.

My initial meeting with each student initiative involves explaining the appeal process; what is the responsibility of the students and what is the responsibility of our office. My responsibility is to obtain past donor and faculty contact information for the appeal. I then merge the data with the student's letter, once I have proofed it. A package of

letters, address labels, envelopes, return envelopes, brochures (that I have printed at the copy centre) and remittal forms is what I make for them to assemble. My contact information appears on the return envelopes and I receive donations from Mar. to July. I track all incoming donors that were appealed, by augmenting the appeal spreadsheet. Each year I analyze the success of the appeal, which I contribute to my supervisor, so that we may serve student initiatives and the priorities of the faculty as effectively as possible.

12% Organize **events**; from prospect report, invitation mailing, RSVP collection to catering, seating plan and name tags.

IE. Dean's Medicine & Dentistry luncheon at Homecoming (July 12, 2005 – 1119 alumni invitations sent, approx. 200 expected, prep to completion lasts July - October)

BC Dental alumni reception June 3, 2005 (Mar – June, 80 invitations sent)

McWhinney Family Medicine event September 20, 2006 (400 invitation sent)

EVENTS

One of the annual events I am responsible for is the Homecoming Dean's Luncheon. In July I run a report which I liaised with Information Management to create. The report reveals all medical and dental alumni, whether they are faculty, their contact details and if they have requested 'no mail'. For the Dean's Luncheon I extract medical and dental alumni in their reunion years (IE. 5 year increments from graduation year). I compose the invitation which is signed by the Dean and Director of Dentistry. By the beginning of August, invitations are sent to approx. 1000 medical and dental alumni. I coordinate with the copy centre to assemble the mailing of invitations, envelopes and labels which I provide. The RSVP's, whether fax, email or phone come to me. I record them in a report which I augment from the invitation list. I choose the menu, coordinating with the catering supervisor. I also guarantee number of guests, notify them of specialty requests (vegetarian or child) and let them know the number of tables and configuration I require. Guests are seated by class year in a seating plan I create. About 60 faculty chairs, associate deans and emeriti are also invited by an invitation I create and send late August. Of this faculty list that I assemble, about 15 attend and I incorporate them into my seating plan, taking into account the preference on their RSVP. This event yields 200 people. I contact the Western Band to provide entertainment and arrange a separate lunch for them in return. I also arrange for a shuttle with the Homecoming coordinator to be available to take guests to the football game after the lunch.

Other Homecoming logistics I coordinate are contacting each Medicine and Dentistry class leader to confirm luncheon attendance and Saturday night dinner plans. The Dean and Director of Dentistry visit the reunion classes Saturday night. I am responsible for obtaining 25, 50, 55, 60, 65 year pins for them to hand out and renting audio visual equipment

10% Cover **reception** at Alumni Hall; spend a half day each week away from the office answering queries and directing calls regarding a variety of inquiries, from alumni benefits and events to diplomas. I sell and produce alumni cards for their use at the library and campus recreation. I also update alumni's change of address on our database.

10% Run & design criteria for **prospecting reports**

INFORMATION MANAGEMENT

When a donor inquires about the status of their fund, my team relies on me to obtain that status. I search through a master database of over 19,000 designation codes, ensuring I have all the codes related to the particular donor fund. If there are any discrepancies within the report, it is my responsibility to contact our Information Management team and work with them to rectify the issue.

I am the mediator between the prospect and financial data needs to the team I support, and our Information Management team. I meet with the Information Management team that includes the Associate Director to create custom reports specific to our faculty, [IE. using designation codes, I pull from a custom donor report, which I requested be made, to deliver the status (donors, amounts, method & date of gift, contact details) of a fund.]

NO.

OTHER DUTIES (less than 10%)

7% **Office management** – replenish office inventory from central supplies, maintain office machines with supplies, replenish call material from graphic services or central office, provide solutions to new office needs, contact supplier with office machine malfunctions, ensure all office machines are in working condition.

5% Ensure documentation and **packages** reach their destination; sort and send mail, local & regional couriers and express post.

5% Make **travel, catering, parking** and **meeting** location & availability arrangements

5% **Call Preparation** including **Researching** prospects online through our intranet and the internet. Making travel arrangements like booking car rentals and using MapQuest.. I also amass relevant supporting material (IE. marketing & stewardship pieces and class list reports which I run from our InfoDesktop software.

3% Augment faculty **stewardship** by analyzing student awards and donors to identify potential call or event activity. Also answer donor questions regarding these awards and events

STEWARDSHIP MAILING

Every October I initiate the Christmas card mailing on behalf of the faculty. I work with the faculty Communications Officer and our stewardship department to ensure we have enough cards by the end of November. Each December I send Christmas cards to alumni, donors and friends that my Director and our two development officers have met with. I also send Christmas cards on behalf of the Dean to donors over \$5000.00 to the faculty. I am responsible for compiling the data, using various reports I worked with Information Management to create. Collecting the data involves extracting the people that our office has met with in the year, extracting donors to the faculty over a certain amount and eliminating duplicates. When this process is complete, I send about 600 cards. I print labels and distribute cards for personal signing.

3% Process **gifts**

3% Work with outside companies to design and **produce promotional items**

IE. 1-hour Signs to produce large presentation cheque for Otolaryngology event,

April 22, 2005

New Era Graphix to produce 350 t-shirts with new Schulich logo for Port Elgin Rotarian golf tournament,

July 5, 2005

PROMOTIONAL ITEMS

For the 2005 Homecoming Dean's Luncheon of which I'm responsible for, I chose mini mint tins for the table favour. I worked with a company I had a past relationship with, New Era Grafix to design the tins with our faculty's new logo. They were so well received that the Dean and the faculty adopted them for future events.

3% Respond to alumni and donor **requests**

3% Book **calls**, re-schedule calls and place **follow up calls** to prospects invited to an event

IE. BC dental alumni reception, June 3, 2005

2% **Contact donors** regarding major gift payments, (IE. donor's credit card is no longer valid on yearly pledge, so call to inquire about a potential new card or expiry date.

2) PLEASE COMPLETE THE FOLLOWING TABLE CONCERNING STAFF MEMBERS WHO REPORT **DIRECTLY AND FORMALLY** TO YOU.

Classification/Rank (eg. Clerk I)	RF/RP Pos'n No.	For CW or TM Staff-employed		Responsible for (eg. Filing records...)
		From (month)	To (month)	
work study student		continuous		data entry, research, photocopying, faxing, assembling packages & mailings

3) PLEASE CHECK THE SUPERVISORY DUTIES WHICH YOU PERFORM **REGULARLY**.

- Training and guidance for new employees
- Work distribution and/or verification of results
- Performance review and salary recommendations
- Hiring and firing; please describe the degree of your involvement:

4. IF YOU **COMPOSE** (originate) WRITTEN MATERIAL, PLEASE COMPLETE THE FOLLOWING TABLE:

Type of Composition	Method of Composition	Brief Description of Content
Correspondence: <input checked="" type="checkbox"/>	X _____ Complete Composition _____ Partial composition with general direction (verbal or written) _____ Prescribed format	invitations, donor thank you letters
Reports: <input checked="" type="checkbox"/>	X _____ Complete composition _____ Partial composition ... _____ Prescribed format	prospecting & design
Other: <input checked="" type="checkbox"/>	_____ Complete composition X _____ Partial composition ... _____ Prescribed format	power point presentations, posters

5) WHAT ARE THE **MINIMUM** SKILLS, EDUCATION, SPECIAL TRAINING AND/OR EXPERIENCE **REQUIRED** TO PERFORM SUCCESSFULLY THE DUTIES OF THIS POSITION?

3 years administration experience
Excellent oral & written communication skills
Proactive communicator who demonstrates initiative
Experience running all aspects of stand-alone office IE. business machines, maintaining inventory
Experience executing an event
Microsoft Word
Advanced Microsoft Excel and/or Access for manipulating data
Ability to work in team and independently with little supervision
Ability to prioritize own time and work to multiple deadlines simultaneously

6) PLEASE DESCRIBE THE **NATURE** AND **FREQUENCY** OF THE SUPERVISION YOU RECEIVE.

Regular bi-weekly team strategy meetings
Collaboration and strategy development with Director and development officers.
Individual meetings with Director as required

7) WHAT TYPES OF PROBLEMS OR INQUIRIES ARE YOU EXPECTED TO DEAL WITH ON YOUR OWN?

Alumni requests of services and benefits.
Gift/pledge payment discrepancies
Data discrepancies in reports that I run
Respond to problems and inquiries relating to projects I am responsible for (events, student initiatives)
Office malfunctions (fax, printer, copier)
Supplier invoice differences after ordering (promotional items, flowers, catering)

8) WHAT TYPES OF PROBLEMS OR INQUIRIES MUST BE REFERRED TO ANOTHER SOURCE FOR SOLUTION?

Donor wanting to make gift/pledge to University
Queries regarding project someone else is responsible for

9) WHAT ACTIVITIES DO YOU PLAN OR ORGANIZE? PLEASE INDICATE THE LENGTH OF TIME INVOLVED (e.g. daily planning of assigned work, monthly ...)

Identify priorities daily as they continually change
 Create timelines and action items, monthly for events and mailings
 Delegate work to match the schedule and aptitude of a work study student

10) PLEASE COMPLETE THE FOLLOWING TABLE CONCERNING YOUR **MOST IMPORTANT** CONTACTS (in person, by telephone, or in writing). PLEASE EXCLUDE CONTACTS WITH YOUR SUPERVISOR AND YOUR SUBORDINATES. INCLUDE GROUPS AS WELL AS INDIVIDUALS.

CONTACT'S TITLE (e.g. Purchasing Agents)	LOCATION (inside outside) dept dept	FREQUENCY (dly wkly mthly)	PURPOSE OF THE COMMUNICATION (e.g. to provide information concerning...)
Records	inside	wkly	record discrepancies, changes & coding
Gift Processing	inside	wkly	gift queries/designations, student initiative funds
Information Management	inside	wkly	design/request reports, discuss data requirements & designations
Catering	outside	wkly	arrange food & beverage for events & meetings
Dean's Office	outside	wkly	exchange information and negotiate Dean's availability and meeting space
Graphic Services	outside	wkly	request/design marketing material, invitations, brochures
Travel Agents	outside	wkly	arrange transportation, accommodation
Promotional Companies	outside	mthly	produce branding items for events and meetings

THIS COMPLETED QUESTIONNAIRE IS AN ACCURATE DESCRIPTION OF THE WORK BEING PERFORMED.

Staff Member:

Present Classification Sec 4 Signature [Signature] Date Oct 12, 2006

Supervisor:

Signature

Date

[Signature] 10/10/06
[Signature] OCT 12 / 06