

**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: Gloria Dawson
Title: Administrative Assistant
Phone: 81367
Email: gdawson@uwo.ca
Department: BACS

(B) Position Information:

Current Incumbent: Gloria Dawson Administrative Assistant
Current Classification: SG 10
Classification Being Appealed: SG 10
Date Evaluation Results Letter Received: October 31, 2005

(C) Information Required For Job Evaluation Appeals Committee

Reason for the appeal: The size of the program and the magnitude of the responsibilities are not reflected in the classification. I am responsible for many of the same jobs as the AOs in other departments in the Social Sciences. The BACS Program is larger than Anthropology and the same approximate size as Political Science and Sociology. The above three departments have AOs. I meet weekly with the AOs from Social Science and Linda Brock to discuss how to best complete our responsibilities. I am the only one in the meetings that is not an AO but I am doing the same work.

Supporting Information (Optional):

(Attach an additional page if more space is required)

(D) Approvals:

Signature of Person Appealing: Gloria Dawson Date: Nov. 18/05

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

January 16, 2006

Re: Gloria Dawson BACS Administrative Assistant
Request for Information and Clarification for JEAC

1. The PDQ states "Please complete the following table concerning staff members who report **directly and formally** to you" Sec IV Assistant to the Director. Currently, tracks attendance and collaborates on daily work load.
2. This is a list of signing authority for "Department Authorization"
 - NCNER
 - SAN (Staff, Proctors, Work Study)
 - GRA
 - Payroll submissions
 - Purchasing up to \$10,000
 - Visa \$10,000 monthly limit

Authorization for Human Resources System for:

- Employee inquiry
- HR Administrator
- Monthly Pay Administrator
- Pay Reconciliation Administrator
- Weekly Pay Administrator

Authorization for Higher Education

- multiple access

3. I process all paperwork for any expenses incurred by the department, faculty and staff including purchase orders, travel expenses, research expenses and faculty reimbursement allowances.

Initiation of Expenses:

- both at the request of the director and as needs arise with staff and faculty, requirements would be assessed and quotes would be obtained from suppliers on and off campus. A recommendation summary would be supplied to the director for approval and then I would place the order. Purchases would include furniture, computer equipment, travel, food, supplies, flowers and anything else required
- purchases under \$1,000 would be placed directly with the suppliers and purchases over \$1,000 would be submitted to the Purchasing department
- suppliers include Western Office Supplies and Food Services on campus and many varied outside suppliers

Budget Planning Process

- supply reports to the director on operating budget (including faculty salaries, staff salaries, benefits and general operating expenses), airport classroom budget and levy budget
- supply information on spending trends over the past few years and expected amounts for the

new budget

- supply information on upcoming projects such as maintaining faculty and staff offices on a yearly cycle including upgrades for computers, furniture, painting of offices, and carpet and room cleaning

Requests Salary

- gather and provide summary of full and part time faculty, full and part time staff, proctors, graduate students, work study students and benefits for budget request
- complete FANs, SANs, GRAs
- submit online and/or in paper format hours for monthly and weekly employees to HR payroll and reconcile weekly and monthly payroll and initiate any problem solving

4. Students

- monitor the acs@uwo.ca email, answering BACS Program questions and assessing other questions to determine the best way to direct them i.e. faculty or departments, Academic Counselling, Registrar, Admission, Centre for New Students, Program Advisor, Director or Dean's Office

Faculty

- communications with faculty includes payroll and human resource information, faculty reimbursement allowances, research and dean's grants, travel allowances, supplies and equipment needs and general information on a variety of questions.
- prepares Promotion and Tenure dossiers with some information provided by faculty, the Director and Dean's office
- communicate with coordinators of projects i.e. Internship, Connected Career Fair
- possible new faculty members by arranging travel and accommodations, itineraries, university general information and policies, human resource contact and general information and city resources and information.

Academic Counselling Office

- this contact will be less frequent as I will have less contact with students as I will be in a separate office from the main BACS office

Staff and Director

- communication with other staff is on a daily basis when discussing BACS administrative needs and daily workload
- communication with the Director on a daily basis when receiving directions on human resource needs for faculty and staff i.e. payroll, budget requests, monthly reporting of budget results and UWOSA AND UWOFA regulations
- providing suggestions of needs within the department

Office of the Registrar

- request information in order to tabulate and summarize statistics of enrollments and trends in growth for Director and department meetings
- contact on behalf of a student or refer student to them

Dean's Office

- weekly meetings with AO's to discuss current information on budget information, FAN's, SAN's, payroll issues, and human resource issues
- request information on procedures
- provide information requested by Dean's office on financial issues

IPB

- request room availability for faculty
- check printouts provided by IPB and investigate any errors

Other Departments or Faculties

- receive Social Science faculty and university information concerning clarification or changes to procedures in Human Resource or Higher Education
- contact and set up meetings for Director i.e. Promotion and Tenure committee
- contact BACS affiliate offices to coordinate joint projects i.e. Connected Career Fair
- communication with Finance department include payment inquiries for travel allowances, faculty reimbursements allowances, vendor payment inquiries, errors in recording on monthly statements and another other department financial issues

Parents

- this will be on an occasional basis when covering in the BACS office for another of the BACS team
- answer general questions about the BACS program and direct them to the appropriate source i.e. Director, Program Advisors, Academic Counsellor, or other departments or faculty

Vendors, others

- vendors – obtaining quotes, making purchases directly or through purchase orders, follow-up on orders and payments
- company representatives – future employers of BACS graduates: communications are through phone and email for job opportunities, information sessions held for BACS students, career fairs
- Accounting designation representatives – communications with Certified Management Accounting representative include financial discussions about donations made to the BACS program and CMA club

5. I am expected to work independently on financial matters and seek the direction of the Director for final approval and signatures and if there are any unsolved problems. Provide information to the Director of any irregularities. This would include requesting quotes, making recommendations, follow-up of deliveries and ensuring payments are made.

Investigate student inquires to provide the best answer or the best way to direct them i.e. "I just received a fee invoice from the registrar for flight training and I am not in the flight portion of the program?" Or "I need to know if I can graduate?"

Monthly reconciliation of budget lines and then contact the finance department if there are problems. Weekly and monthly payroll reconciliation to ensure accuracy and then contact payroll if there are problems. Monthly reconciliation of research grants to ensure accuracy and then contact research development to correct any problems.

6. I would estimate a minimum of 5 years of experience would be recommended in both professional and academic settings. The length of time is not as important as the type of experience. It is important to have strong people and problem solving skills when working with the variety of contacts required for this position from students to professionals.
7. I feel it is important to have a university degree and having one in the Social Science faculty has helped me understand the job better. Also, since a large portion of the position involves finances, it is important to have an accounting experience.
8. To "assists the Director with budget projections" I would supply reports to the director from the operating budget (including faculty salaries, staff salaries, benefits and general operating expenses), airport classroom budget and levy budget. Supply information on spending trends over the past few years and expected amounts for the new budget. Supply quotes and recommendations for future projects.

"Projected well-being of the unit" I feel this would be to help the BACS staff and faculty work together to ensure a strong working team. Help each other reach their potential and goals. When necessary or appropriate to discuss and find solutions to share the work load to ensure the jobs are completed. Also, report to and make recommendations to the Director of any problems or possible solutions.

9. Reports required in this position include completing reports already formatted by another department or by the Dean's office. This is a partial list:
- Recruitment: how many people applied, how many were interviewed, how many were offered the position, statistics on gender, citizenships, visible minority, and those with disabilities.
 - Recruitment: "detailed information must be kept as, should an appointment be made, this information forms part of the hiring package that is submitted to the Dean and

Provost.”

- Human Resource & Payroll: Alternative Workloads, RMYA, Advertisements, FAN, SAN, GRA, NCNER and contact letters
- Dean’s office: Summary of full and part time salaries and benefits
- Requested by Director: summary of staff holidays, leave and sick leave
- Promotion and Tenure dossiers

Reports required in this position that do not have pre-formatted style would include:

- projection of staff holiday requests and schedule
- summary of quotes for department purchases
- statistics requested by Director for department meetings
- summary of faculty workload
- schedules of hours for weekly/monthly employees i.e. proctors and work study students
- schedules for faculty and staff offices for routine maintenance and inventory of equipment including computers
- for Promotion and Tenure committee an accurate record of those who have attended the meetings, reviewed dossiers and signatures required for documents

10. This position as recorded on the PDQ “monitors and verifies the BACS budget transactions”, “inputs online journal entries and prepares budget transfer forms” and “ensures the timely completion, accuracy and completeness of budget documents and records”. Therefore, I would be responsible for the follow-up on invoicing, purchasing and expense issues, reconciliation of accounts and payroll issues. All of the financial issues within this department fall within the responsibility of this position. The Director has final approval but I am expected to work independently to ensure accurate and complete financial files and reports. Any unresolved issues or any clarifications required are directed to the Director, Faculty Administrative Officer, or the appropriate department i.e. payroll, human resource or finance.



Office of the Dean • Faculty of Social Science

21 November 2005

Job Evaluations Appeal Committee:

I write in response to the JEAC appeal of Gloria Dawson.. To compare Ms. Dawson's position with that of other positions in the Faculty of Social Science:

1. Ms Dawson does not supervise the Undergraduate Program Advisors (currently one, a second position is currently being staffed) and she is not directly involved with student matters except as a team member of the unit. The Director is accountable for the Undergraduate Program.
2. BACS is an undergraduate program only and therefore Ms. Dawson does not supervise a Graduate Coordinator nor does she have to know any of the complexities of graduate programs.
3. As there is no graduate program, Ms. Dawson is not accountable for the administration of the graduate funding model, nor are there post-docs to be appointed. The Graduate Teaching Assistants in BACS (in number, 3 - 5) are students registered in other programs, so are vetted and funded in more traditional ways (i.e., only using operating funds, without a research component).
4. There are no Research Centres with related personnel or funding. There are no cost-recovery units.
5. There are few research grants held by faculty members in the BACS program, so there is less complexity for funding in the program.
6. The position may be similar in responsibility to that of an SG 10 in the History Department or an SG 10 in the Economics Department. While both the History and Economics staff members have many responsibilities in a Research component, Ms. Dawson prepares the SANs and FANs to make up for the much smaller Research component in BACS. All three positions are responsible for the day-to-day and projected financial well-being of their respective unit, as well as the Promotion and Tenure proceedings for their unit. The current complement of probationary and tenured faculty in the BACS program is approximately one-third the size of either History or Economics.

7. The much smaller size of BACS compared to our other departments (and the lack of a graduate program) means that the Director of the program is much more closely involved in the day to day operations of the unit than the Chairs in other departments.

Yours sincerely,



Linda Brock
Administrative Officer
Office of the Dean
Faculty of Social Science

:lb

c: K. Fleming

UWOSA JOB EVALUATION RECORDING FORM

Office Support Plan

(APPEAL)

Job Title:

Eval. Date: 2006/01/18

Dept:
Dept. Num.
Incumbent: Gloria Dawson
Citite Mem. Present: UWOSA: M. Broadfoot, C. Sloan
 ADMIN: P. Grant, C. Zrini

	FACTOR	COMMENTS	SUB FACT	DEGREE	PTS	Profile			
						-	=	+	
I	Job Knowledge	Some university courses. Accounting experience needed. Takes at least one cycle to learn job	Educ	3					
			Exper.		E	85			
II	Initiative	Minimal supervision. Organize own workload. Answers routine questions		4		55			
III	Complexity/Judgement	Works within controlled procedures and policies		3		25			
IV	Contacts	Mostly exchange of information. Harmonious relationships		3		45			
V	Errors	Visible within unit. Mostly financial errors, someone else would catch error		3		45			
VI	Supervision of Others	N/A. No one reports to her directly	Char.	1					
			Scope		A	5			
VII	Effort/Demands	Attention to detail, meeting deadlines		3		60			
VIII	Physical Environment	Normal		1		10			

CLASSIFICATION ASSIGNED

Total Pts: **330**

Group: _____ Salary Grade _____

Level: _____ 10 _____

Co-Chair Signatures: UWOSA: M. Broadfoof _____

ADMIN: P. Grant _____

POSITION DESCRIPTION QUESTIONNAIRE

THE UNIVERSITY OF WESTERN ONTARIO EMPLOYEE RELATIONS

U.W.O. ID NUMBER _____

PRESENT INCUMBENT
SURNAME _____ INITIALS _____

POSITION IDENTIFICATION
DEPT. NO _____ P.S. JOB CODE _____

BASIC POSITION INFORMATION

DEPT. NAME _____

SECTION NAME _____

LOCATION _____

WORK WEEK HRS. _____

SUPERVISOR SURNAME _____

INITIAL _____ PHONE _____

FOR SALARY ADMINISTRATION USE

CLASS'N Administrative Assistant SG 10

CLASS'D Oct/05 EFFECT _____
Date Date

ANALYST JCD

- 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	%
-----	--------------	---

The Administrative Assistant provides administrative support to the Director of BACS. The incumbent reports directly to the Director and is expected to work independently with minimal supervision and training while maintaining the confidentiality of all information. All staff within the office work together as a team and each staff member is expected to collaborate with other staff members as necessary.

45%

BUDGET ADMINISTRATION

- Establishes the lines and programs required for the effective administration of the BACS budget. Monitors and verifies the BACS budget transactions
- Tracks and monitors research grants pertaining to BACS faculty members
- inputs online journal entries and prepares budget transfer forms
- prepares purchase orders, expense reports, cheque requisitions and one-time payments
- tracks equipment and furnishing inventory and recommends purchases to the Director as needed
- monitors hours of part-time staff, proctors, work/study students and requests salary. The incumbent then reconciles the salary payments and ensures they are within budget. Ensures that the monthly salaries are correctly recorded and issued.
- processes the Faculty Professional Expense Reimbursement forms
- advises the Director of any situations that may require his/her intervention, assists the Director with budget projections
- ensures the timely completion, accuracy and completeness of budget documents and records
- other duties as assigned by the Director

45%

HUMAN RESOURCE ADMINISTRATION

- maintains all confidential staff and faculty files regarding salary and human resource matters
- coordinates the day-to-day operation of the office to ensure coverage in administration of functions and may delegate tasks to other office staff
- maintains records for vacation, leaves, sick leaves and discusses and discrepancies with the Director with guidance from the Director, accurately prepares all Faculty recruitment ads for both full-time and part-time faculty members
- coordinates the recruitment of new faculty, prepares the itineraries, coordinates the travel arrangements, accommodations. The incumbent also arranges for the payment of their expenses. Detailed information must be kept as, should an appointment be made, this information forms part of the hiring package that is submitted to the Dean and Provost.

- Track the hiring records of all part-time faculty to ensure compliance with the UWOFA agreement with regards to Status and Rights
- Prepare the appointment notices for all staff and faculty as well as any forms relating to rank, status or salary
- Ensures the timely completion, accuracy and completeness of Human Resource/Faculty Relations documents and records]
- Coordinates the Promotion and Tenure process in the Program, assisting the Director and Faculty Administrative Officer with meetings, dossiers and publications for Program faculty members. Prepares and ensures the accuracy and completeness of files
- Coordinates the Committees of the Program, including Annual Performance Evaluation, Workload and Appointments
- Other duties as assigned by the Director

NO. OTHER DUTIES (less than 10%)

- gathers, tabulates and summarizes statistics for the program
- provides backup for other office staff in scheduling appointments, answering routine student/faculty inquiries
- special projects as requested by the Director

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)	

Assistant to the Director

Sec IV

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
Corres- pondence:	<input checked="" type="checkbox"/> Complete Composition <input checked="" type="checkbox"/> Partial composition with general direction (verbal or written) <input checked="" type="checkbox"/> Prescribed format	e-mails, letters either in prescribed format, edited or complete composition
Reports:	<input checked="" type="checkbox"/> Complete composition <input checked="" type="checkbox"/> Partial composition ... <input checked="" type="checkbox"/> Prescribed format	as requested by the Director
Other:	<input checked="" type="checkbox"/> Complete composition <input checked="" type="checkbox"/> Partial composition ... <input checked="" type="checkbox"/> Prescribed format	as requested by the Director

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

A university degree in a Social Science discipline is strongly preferred, but the completion of some university courses is required. The incumbent should have experience in a university setting with knowledge of program policies and requirements. Good oral and written communication skills and organizational skills are required. Must be able to work in a team environment as well as be able to work independently. Ability to work under pressure is required. Experience with Word, WordPerfect and Excel are required, while experience with Peoplesoft FS and HR is preferred. Must have experience in the field of accounting.

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

The incumbent should be able to work independently, with infrequent direction from the Director. The incumbent is expected to use exercise sound judgment and initiative.

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

The incumbent would answer routine questions regarding BACS budget matters, as well as organize workload and priorities. The incumbent may answer routine student enquiries regarding the BACS program.

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

The incumbent would refer unusual budget requests or problems to the Director. Unusual student requests or problems would be referred to the Program Advisor, the Director, the Academic Counselling Office or the Office of the Dean.

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

The incumbent would organize their own workload and priorities. The incumbent would help to plan any special events in cooperation with other members of the Program office. The office works as a team and the incumbent may be required to either help other members or request help from other members.

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...)
--	--	--------------------------------------	--

- Students
- Faculty
- Academic Counselling Office
- Staff and Director
- Office of the Registrar
- Dean's Office
- IPB
- Other Dept. and Faculties
- Parents
- Vendors, etc.

The incumbent would communicate with staff, faculty and students in BACS, social science and UWO as a whole. The incumbent would provide information, request information, offer suggestions or guidance.

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

Staff Member:

Present Classification _____ Signature _____ Date _____

Supervisor:

Signature _____ Date _____

**POSITION DESCRIPTION
QUESTIONNAIRE**

**The UNIVERSITY of WESTERN ONTARIO
EMPLOYEE RELATIONS DEPARTMENT**

A. PURPOSE

University Personnel Policy requires the maintenance of up-to-date job information on all staff positions for use in job evaluation and other programs (e.g. staffing, orientation, etc.) This form is designed to encourage direct participation by the staff member in providing information about the position. Your co-operation in completing the attached questionnaire is appreciated.

B. USE

This Questionnaire **must be used** to describe all staff positions covered under the U.W.O. Staff Association. Should you require assistance in completing this form, contact Human Resources at extension 82194.

C. INSTRUCTIONS

1. The information must be authorized (signed & dated) by both the staff member, the immediate supervisor, and the Dean or Director before it is forwarded to the Salary Administration in the Human Resources Department.
2. The following table may be helpful in determining annual time percentages:

1 hr/day (14%)	1 day/week (20%)	1 day/year (0.4%)
1 hr/week (3%)	1 day/month (4.5%)	1 week/year (2%)
3. If necessary, please attach an extra page for additional information which you feel is required to provide a complete understanding of your position.

D. NOTES

1. A change in duties and/or responsibilities does not automatically imply a change in classification and salary.
2. A job description is not intended to measure an increase in the volume of work; rather it should only reflect the areas of responsibilities and the nature of duties.

Please complete below and forward with the Questionnaire.

Reason(s) for requested review

- Classify new position
- Change in responsibilities
- Check current classification
- Update your records

Routing approvals: I agree that this review is required

Immediate supervisor _____
Department Head Kurt R. [Signature]
Dean's Office B. [Signature]
Date 2005 10 17