

**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:
Maureen Kennedy
Title: Administrative Assistant
Phone: 519-661-2111 x 22059
Email: mkennedy@uwo.ca
Department: Family Medicine

Name of person requesting appeal:
Cathy Thorpe
Title: Research Associate
Phone: 519-661-2111 x 22055
Email: ssccat@uwo.ca
Department: Family Medicine

(B) Position Information:

Current Incumbent: Maureen Kennedy
Current Classification: Salary Grade 9, Administrative Assistant
Classification Being Appealed: Salary Grade 9
Date Evaluation Results Letter Received: January 2, 2007

(C) Information Required For Job Evaluation Appeals Committee

Reason for the appeal:

In our view, the variety of administrative and financial duties, along with the level of responsibility and autonomy required to carry out these duties merits a re-classification to salary grade 10 or higher. We have other salary grade 9 positions within the CSFM and this job requires a broader knowledge of and enhanced skills to apply the UWO policy and procedures such as PeopleSoft (financial and Human Resources) and purchasing. This Administrative Assistant position is the resource person to assist these grade 9 and other staff members, often resolving the problems or completing the process for these items. Also, this position requires less supervision (bi-weekly when required) than the other salary grade 9 positions at the CSFM, an indication of the independent work expected of this role.

In particular, we would also like to comment on the following specific job areas:

CSFM is a wholly grant funded research unit, and as such, staff levels fluctuate as grants begin and end. New staff and projects add to the work load and responsibilities, because this position is the main administrative support and information resource for staff and faculty. The environment, then, is one of constant motion and change. For example, this role is responsible for organizing the set up and moving of phones and work stations, as well as providing guidance and assistance to new staff regarding CSFM and the UWO policy and procedures. (e.g. payroll process, email set up)

This role is solely responsible for the management of the annual physician ACCESS database updates. This yearly process is crucial because these data are used for many research purposes, including the dissemination of research findings. This position formally trains and supervises summer students hired specifically for this task.

Currently, there are several grants operating at CSFM which are held at other institutions (e.g., LRI). This requires detailed accounting of expenses incurred at CSFM which are then billed to the other institution, and following up to ensure payment is received.

There are over 30 grants at CSFM. This position is required to detail expenses such as Purolator, postage, faxing charges, photocopying for each individual grant on a monthly or quarterly basis and create journal entries to recover these expenses. To effectively manage this process, the incumbent has designed forms to track these expenses.

This position provides administrative/financial assistance to one cross appointed faculty member.

(Psychology and Family Medicine). These duties are wide ranging and include reconciling accounts, preparing budgets for his current grants (seven grants and applications are pending), forecasting expenses, and balancing 3 VISA accounts monthly (approx 20 to 35 transactions monthly). Other financial duties involve investigation of individual expenses on statements that lack a receipt, purchasing books, computers, office supplies, etc. Each month, an updated Excel spread sheet is created for each grant showing both expenses and forecasts. This administrative staff person collaborates with the faculty member and his project coordinators, graduate students, and research assistants. With regard to grant proposals, this position requires expertise in utilizing web-based forms, a mandatory requirement for large granting agencies such as CIHR.

Purchasing for both CSFM and faculty member in Psychology. The incumbent has a \$10,000 approval limit in Psychology, and is the contact person responsible for all staff and faculty purchasing, whether it is in house purchasing done through Western Office Supplies or sourcing products such as furniture and computers.

The Department Research Committee (DRC) work is extremely time sensitive, and demands liaising with a broad spectrum of staff and faculty. The position collaborates with the Director before each meeting to set the agenda, and after each meeting to review the minutes and any tasks that have arisen from the meeting. The DRC reviews a large number of projects each year which we receive from a wide variety of sources, including faculty, graduate students and family medicine residents, both within and outside the UWO. Specific responsibilities include explaining the application process and deadlines, sending the correct forms, responding to a myriad of administrative and research questions, finding reviewers for the projects, and liaising with both the reviewers and applicants through all the steps of the process.

Supporting Information (Optional):

Pat VandeSompel (the Administrative Officer) suggested that clarification of the management structure and organization of the Centre for Studies in Family Medicine would be beneficial.

The Centre for Studies in Family Medicine (CSFM) is a research unit of the Department of Family Medicine, and like other research units in the department, it is structured differently and functions independently. In terms of organizational structure, the Research Associate reports to the Director of the Centre, and the Administrative Assistant position under consideration reports to the Research Associate. The Research Associate manages the entire organization, including the personnel, financial, and research activities of the Centre, as well as organizational development and planning. The Administrative Assistant position provides administrative and financial assistance to the Research Associate and the entire Centre. This Administrative Assistant position is responsible for investigating and handling many of the day to day challenges facing the Centre, and acts as an advisor to all members regarding University and Centre procedures and policies.

For your information, the CSFM does receive administrative coordination (about 2 days per week) from the Administrative Co-ordinator of Research, a position supervised by the Administrative Officer of the Department of Family Medicine. The Administrative Co-ordinator of Research shares and receives information on financial and human resource issues with the Administrative Assistant but no supervisory relationship exists between these two positions.

(D) Approvals:

Signature of Person Appealing: Maureen Kennedy Date: Jan. 9. /07
(Maureen Kennedy)

Signature of Supervisor: Cathy Thorpe Date: Jan. 9 /07
(Cathy Thorpe)

UWOSA JOB EVALUATION RECORDING FORM
Office Support Plan
 (APPEAL)

Dept:
Dept. Num.
Incumbent: Maureen Kennedy
Citite Mem.Present: UWOSA: L. Johnson, J. Millette, L. Munn, M. Parker,
 ADMIN: C. Bumbacco, P. Grant, V. Smith, C. Zrini

Job Title: Admin. Asst.

Eval. Date:

I	FACTOR	COMMENTS	SUB FACT	DEGREE	PTS	Profile		
						-	=	+
	Job Knowledge	Community college or university graduate	Educ	4	100			
			Exper.					
II	Initiative	General policies but defined objectives. Supervisor aids in problem solving		D				
III	Complexity/Judgement	Variety of activities however there are standard regulations		4	55			
IV	Contacts	Regular contacts to obtain information and to provide advice		4	35			
V	Errors	Errors cause embarrassment to Faculty. Granting delays		3	45			
VI	Supervision of Others	Supervision of one work study. No direct supervision of full-time staff but does act as "lead" for new employees	Char.	3	45			
			Scope	2				
VII	Effort/Demands	Regular periods of high activity. Critical deadlines (grants, etc)		A	10			
VIII	Physical Environment	Standard office		2	30			
				1	10			

CLASSIFICATION ASSIGNED

Total Pts: **330**

Group: _____ Salary Grade _____

Level: _____ 10 _____

Co-Chair Signatures: UWOSA: M. Parker

ADMIN: C. Bumbacco

- e) Maintain and update the physician database which is used for FOCUS mailings and research purposes. Coordinate the annual faxing used to verify contact information for each entry in the database. Initiate queries and reports to accommodate requests for information from the database.
 - f) Enter weekly and monthly payroll for all Family Medicine part time staff, Liaison members and work study students in UWO Human Resources. Verify hours and generate weekly report, and liaise with Administrative Officer and Supervisor.
 - g) Department Research Committee (DRC) Bi-monthly meetings. Set agenda in collaboration with Centre Director, and distribute to members. Attend meetings, take minutes, write up minutes, review minutes with Centre Director and distribute to members. Coordinate the review of projects submitted to the DRC for scientific merit or requests for funding from the Department Research Trust Fund. Ensure that applicants have the correct forms, have submitted the correct information as requested, and advise applicants of extra requirements (i.e. Ethics approval or budgets). Coordinate reviewers' requests for changes or additional information with the applicants. Ensure that the applicants, reviewers, and members are aware of and keep to the strict deadlines. Communicate motions to the Departmental Committee which require voting at their monthly meetings.
 - h) Bi-monthly staff meetings. Set agenda in collaboration with Research Associate. Attend meetings, take minutes, write up and distribute minutes.
 - i) Maintain adequate levels of all office supplies for the Centre by checking inventory, ordering weekly, and assisting all staff and faculty with special requests for supplies, ensuring that best prices are maintained and UWO Purchasing policies are followed.
 - j) Maintain working paper library. Process requests for copies, ensure adequate hard copies are available, and transfer word files to PDF files for electronic requests.
 - k) Maintain postage meter including ordering postage, assisting staff with usage, updating information as necessary and maintaining individual postage accounts for each research grant.
 - l) ITS telephone contact for the Centre. Receive monthly ITS telephone bill, checking for accuracy and errors. Liaise with ITS for work needed in Centre such as phone and LAN line installations and changes. Arrange all teleconferences for unit. Advise staff and faculty of charges and changes to system.
 - m) Assist new staff with orientation to the Centre.
- 2) Provide Administrative/Financial assistance for one Joint Appointed Inter-disciplinary faculty member. (40%)
- a) Record and manage all monthly account transactions for 7 research grants. Verify the expenditures, trace missing receipts, follow up all discrepancies with administrative assistants, project coordinators and research assistants, and investigate in detail any unidentified expenses.
 - b) Establish and maintain Excel spreadsheets for each research account in accordance with the approved budgets and track expenditures monthly against the budget.
 - c) Generate reports and balance each account monthly.
 - d) Randomization of patients for three year study. Liaise between project coordinator and coaches to coordinate information and advise of which patients are randomized or usual care using special databases designed for study.
 - e) Assist with budget preparations and quarterly review of budgets versus expenses.
 - f) Prepare and input journal entries in People Soft for all research grants.

- g) Track telephone expenditures (monthly charges and long distance) for multiple telephone lines and various staff.
- h) Reconciliation of UWO VISA statements for one faculty and two staff members.
- i) Assist in preparation of various grant proposals using web based forms
- j) Organize travel plans and itinerary for conferences and other trips as necessary
- k) Order books from various sources, looking for best prices, out of print items, etc.
- l) Proof read articles, grant applications and other correspondence.

NO.	OTHER DUTIES (less than 10%)	3%
	Other duties as required. Assist with coordinating staff moves to various offices	

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)	
Summer Students		May	August	Assist with Physician database updates

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"/>	<input checked="" type="checkbox"/> Complete Composition <input checked="" type="checkbox"/> Partial composition with general direction (verbal or written) <input checked="" type="checkbox"/> Prescribed format	email to faculty/staff (admin updates) correspondence to contacts outside department -- to provide and to request information Agendas and minutes of DRC and staff meetings. Coordination of DRC projects between applicants and reviewers, including email approval when applicable.
Reports: <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Complete composition <input checked="" type="checkbox"/> Partial composition ... <input checked="" type="checkbox"/> Prescribed format	monthly financial reports annual reports journal entries
Other: <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Complete composition <input checked="" type="checkbox"/> Partial composition <input checked="" type="checkbox"/> Prescribed format	Staff meetings agenda and minutes.

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

Community college or university graduate with training in business/accounting courses or equivalent administrative experience; high level of computing skills (MS Office, especially Word, Excel, Publisher, PowerPoint and Access and Outlook); outstanding interpersonal skills, maturity and the ability to take initiative, work independently, prioritize conflicting job demands and work with multiple supervisors, ability to communicate effectively with staff, faculty and suppliers.

Preferred qualifications:

Experience in a university environment and knowledge of the UWO policies and procedures.

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

Regular contact with faculty and Research Associate (bi-weekly if required)
Supervisor aids in problem solving as needed.

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

Calling in repair/service for equipment when necessary.
Sourcing products for centre.
Property manager for minor repairs, issues concerning locks, lighting, etc.

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

Queries regarding research methods on the Department Research Committee projects.

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

Weekly planning of assigned work,
Process for updating physician database, adding and deleting contacts, using a combination of faxing, phoning.

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...)
Financial Officer, Research Accounts	outside dept	monthly	financial reports for granting agencies
Purchasing coordinator	outside dept	weekly	purchasing procedures or preferred vendors
ITS staff	outside dept	weekly	additions/deletions to phones, LAN teleconferences,
Sales reps	outside dept	monthly	updates on new equipment, billing problems

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

Staff Member:

Present Classification

SG-9

Signature

Maureen Henry

Date

July 18/06

Supervisor:

Signature

Cathy Thorpe

Date

July 18/06

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 Salary Administration at extension 82198.

C. INSTRUCTIONS

- 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 Employee Relations Department.
- 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%)
- 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

- A change in duties and/or responsibilities does not automatically imply a change in classification and salary.
- 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: Cathy Thorpe *Cathy Thorpe*
- Department Head *W. Anderson*
- Dean's Office *C*
- Date *July 18/06*