

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: Nicky Cottee  
Title: Admissions Coordinator  
Phone: 519-661-3990  
Email: ncottee@ivey.uwo.ca  
Department: Business – Executive MBA Program

(B) Position Information:

Current Incumbent: Nicky Cottee  
Current Classification: Secretary IV  
Classification Being Appealed: Administrative Secretary Salary Grade 9  
Date Evaluation Results Letter Received: November 2, 2009

(C) Information Required For Job Evaluation Appeals Committee

Reason for the appeal: The Admissions Coordinator Position was previously classified at a Salary Grade 10. Resume assessments were removed as a responsibility in 2007, and the job was reclassified as Secretary IV.

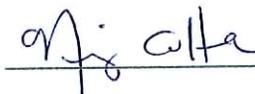
I have been completing resume assessments as part of my regular responsibilities since May of 2009, so the job description was submitted for reassessment. The current job description for the EMBA Admissions Coordinator position is the same as the job description that was previously classified at Salary Grade 10, but it was only classified as a Salary Grade 9 position upon review.

Given that there is precedent for this position, as described, to be a Salary Grade 10, and that similar positions both within Ivey and the greater University are minimally classified at a salary Grade 10, I believe an error was made in classifying the current position.

Supporting Information (Optional):

Please find attached a copy of the version of the job description that was previously classified at Salary Grade 10, as well as a copy of the recently submitted job description.

(D) Approvals:

Signature of Person Appealing:  Date: Nov 10/09

*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:** Ivey Executive MBA  
**Dept. Num.** 240100  
**Incumbent:** Nicky Cottee  
**Citite Mem.Present:** UWOSA: L. Johnson, J. Millette  
 ADMIN: L. Brock, C. Bumbacco

**Job Title:** Admissions Coordinator

**Eval. Date:** Feb-10

	FACTOR	COMMENTS	SUB FACT	DEGREE	PTS	Profile		
						-	=	+
I	Job Knowledge	College graduate 5 years of experience	Educ	3				
			Exper.		G	130		
II	Initiative	Minimal Supervision. Defined objectives, service standards						
III	Complexity/Judgement	Judgement - provide counselling / guidance; selecting candidates. Varied work, specific objectives		3		35		
				4		35		
IV	Contacts	Regular contact with EMBA applicants. Represents university and Ivey. Exchange factual information						
V	Errors	Awkward - errors visible outside unit. Embarrassment if incorrect information provided		3		45		
				3		45		
VI	Supervision of Others	Incidental	Char.	1				
			Scope		A	5		
VII	Effort/Demands	Regular but limited high volume. Mental and visual concentration						
VIII	Physical Environment	Standard office. Some travel involved		2		30		
				1		10		

CLASSIFICATION ASSIGNED

Total Pts: 335

Group: \_\_\_\_\_ Salary Grade \_\_\_\_\_

Level: \_\_\_\_\_ 10 \_\_\_\_\_

Co-Chair Signatures: UWOSA: Lori Johnson

ADMIN: Chris Bumbacco

**POSITION DESCRIPTION  
QUESTIONNAIRE**

**THE UNIVERSITY OF WESTERN ONTARIO  
EMPLOYEE RELATIONS**

U.W.O. ID NUMBER	PRESENT INCUMBENT		POSITION IDENTIFICATION	
	SURNAME	INITIALS	DEPT. NO	P.S. JOB CODE
	COTTEE	NICKY	240100	SASX36

BASIC POSITION INFORMATION

DEPT. NAME Executive MBA Program  
SECTION NAME Ivey  
LOCATION Ivey  
WORK WEEK HRS. 35

FOR SALARY ADMINISTRATION USE	
CLASS'N	Admissions Assistant SR 10
CLASS'D	Feb/10 EFFECT Oct 109
	<small>Date Date</small>
ANALYST	LEAC

SUPERVISOR SURNAME Clarke INITIAL J.D. PHONE 83887

Updated: May 25, 2009

- 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.)

**DIMENSIONS**

The Richard Ivey School of Business is Canada's premier business school, recognized worldwide for the quality of its management programs. To be successful in a highly competitive environment, it is essential that staff provide outstanding customer service and are committed to excellence in all activities. The Executive MBA program is a main business unit within the Ivey Business School that makes a significant financial contribution to the School's operating budget, and has been identified strategically as an area for growth and investment within the School.

This position involves administering and coordinating the recruitment and admissions process in the Ivey Executive MBA program. This includes providing counseling and guidance to qualified candidates through-out the client engagement process; acting as a resource person/liaison; controlling information flow; and coordinating the data processing. Also, this position involves participation in executing the marketing strategy of the program. This position involves personal judgment and discretion to shape the incumbent's duties on a day-to-day basis as need and departmental priorities dictate.

The objective of all positions in the Executive MBA Program Office is to surpass the expectations of our clients by providing superior customer service for the Executive MBA program participants by assisting potential applicants, current participants and faculty with all program related activities.

**Annual Program Activities**

Inquires:	800
# of Preliminary Assessments	700
# of Applicants	175
# of Information Sessions:	70 in the Greater Toronto Area and Southwestern Ontario
# of class visitors:	80
# of program intakes	2 (February and September)
Class Session Days:	132
International Trips:	10 days (plus one 5 day Mexico optional trip)
Annual program revenue:	\$9.0 million

NO.	MAJOR DUTIES	95%
-----	--------------	-----

(. . . actions that make the most positive impact on the success of the Richard Ivey School of Business listed in order of importance)

### Customer Relations 40%

Act as a department resource for program inquires and the main liaison for program applicants. This involves acting as a resource person providing professional guidance with a strong customer-focused mindset while keeping program directors advised and aware of important matters. This includes, but not limited to, liaising with others within the department and within the university; serving as contact for questions, comments or concerns; and resolving problems where possible and answer questions as they rise and redirecting only highly unusual problems to the applicable program director.

- Provide excellent customer service to sustain Ivey's reputation, in a highly competitive market place, as the provider of Canada's premier Executive MBA Program by responding in a professional, helpful and knowledgeable manner to all clients and individuals involved in the Executive MBA program. This includes proactively providing program inquires and applicants information or other resources in providing candidates with all the information they require to assist them.
- Coordinate all walk-in and telephone inquiries, and coordinate the mail, email, and web inquiries for the Executive MBA programs. Respond to customer enquiries by phone and in writing, providing detailed information on all aspects of the program including: admission criteria, costs, schedule delivery format and financing options. Inform candidates of the Ivey program's superiority relative to the alternatives. Refer inquiries to appropriate people elsewhere in Ivey or UWO as needed.
- Provide knowledgeable and professional guidance to potential candidates on an individual basis to help them determine their suitability for the Executive MBA program and to attract the best candidates to Ivey based on admissions criteria. This includes, but not limited to; reviewing resumes submitted by potential candidates and providing feedback on admissibility; providing individuals advice on program regulations, policies and procedures; and assessing academic transcripts for admission and to determine GMAT exemptions.
- Be knowledgeable of Ivey and UWO programs and services. Work closely with the Director, Executive MBA Program Services and the Class Managers to ensure current knowledge about the program, its candidates and participants.
- Provide knowledgeable and professional guidance and advice to individual applicants to help guide them to complete their application file. This includes, but not limited to; keeping in regular contact with applicants in reminding and informing them of components that are still outstanding; provide guidance on ways the applicant can strengthen their file, assist with details of the application including the application form, references, employer endorsement letter, and self assessment questions.
- Track and identify prospects for follow-up and ensure that the appropriate follow-up is completed with respect to the service expectations. This may include, but not limited to: initiate outbound telemarketing calls to provide prospective candidates with additional information and encouragement to begin the application process, if appropriate. Determine, where appropriate, individuals that may require a follow-up call from a program director.
- Meet defined service expectations and inform the appropriate program director of any organizational barriers that diminishes the ability to meet these standards. The main service standards are outlined below:
  - Inquiry packages are sent by express post within one (1) business day
  - One (1) business day turnaround on requests or, where appropriate, a follow-up is made.
  - Contact made with applicants within (1) business day to inform them of the components of their application received and wait is outstanding.
  - No obligation resume assessments follow-up or completed within two (2) business days.
  - Inform applicants when thier file is complete and ready for review by the admission committee
  - Within five (5) business days of their file being complete an offer letter will be issued.

## **Administer operational functions or processes 40%**

Develop, implement and Coordinate the administrative operational functions or processes related to the recruitment and admissions process. Duties include assembly of client and applicant files, correspondence, information collecting and data processing and management. This includes processing the relevant data in the Executive MBA contact management database (Maximizer) and Peoplesoft; and generating offer letters and deposit invoices with the relevant information. Resolve problems where possible and answer questions as they arise; redirect unusual problems to the program directors.

- Manage the Executive MBA contact management database by maintaining its accuracy, integrity and structure to ensure that it is effectively and maximally utilized.. This includes program inquires, information session attendees, preliminary assessments and program applicants. This includes individual and contact records; user-defined fields; and communication. Ensure that all information is captured in the database to be used for analysis and reports from database records.
- Responsible for managing the maintenance and integrity of applicant files, both hard copy and electronic form. Ensuring that the appropriate file is activated and the appropriate information is captured in the UWO information system (PeopleSoft) and the appropriate Ivey systems.
  - Providing the necessary data for the participant information to be uploaded in IRIS.
  - Transcript evaluation
  - Undergraduate school and grade evaluation
  - GMAT and TOEFL score verification (if applicable)
  - Liaise with the School of Graduate and Postdoctoral Studies.
  - Ensure that an applicant file has all of its components and is complete before being sent to the Admissions Committee.
  - Provide the Admissions Committee a recommendation on whether the applicant meets the admissions requirements and alert the Committee to any misalignments with our defined admission requirements,
  - Generate the offer letter that provides the individual with a student number and PIN
  - Track offers accepted and declined, and deposits paid.
- In consultation with the Program Services Director, contribute to the ongoing refinement of processes and procedures related to the successful execution of the Executive MBA program admissions process. This includes providing feedback to the Program Service Director on issues of service delivery.
- Coordinate the special admissions process including, but not limited to: identifying prospects that meet the defined criteria of a special admit; Prepare the summary reports for special admission candidates and coordinate the review process of special admit candidates by the MBA Special Admissions Committee; regularly inform the appropriate program director on the status of the percentage of special admits per intake.
- Review and update the application guidelines document and forms (hard copy and online) as required to ensure that all the necessary information is captured and that the guidelines and forms are accurate and convenient for our clients.

## **Administrative Support (5%)**

Perform administrative support duties such as screening phone calls, initiating and drafting often sensitive correspondence, scheduling and assisting in preparation of reports. Assist with special projects and provide reception services as required.

- Provide administrative assistance to the Director, Executive MBA Program Services. This includes, but not limited to:
  - Preparing correspondence (electronic and written)
  - Maintaining files (hard copy and electronic)
  - Prepare and update various reports, including client contact lists, application summaries, etc.
  - Update and track information such as client follow-up lists, class visit schedules, information session schedules and attendance, checklists, etc.
  - Maintain the contact management database to capture the interaction and correspondence between the Director, Executive MBA Program Services and various clients

- Provide administrative support for special projects related to the EMBA Program Office.

### **Marketing activities (15%)**

- Working closely with program directors, participate in the development of collateral materials (website, brochures, fact sheets, etc.); online activities (website); tactical marketing efforts (advertising, direct marketing).
- Create, update and revise communication templates (letters, emails, faxes, flyers, etc.) related to marketing and recruitment to accurately reflect the program offering (dates, schedule, rankings, features, etc.)
- Gather and compile data related to our marketing and recruitment activities, including, but not limited to trends; marketing survey results; and conversion rates across our client engagement process.
- Assist in the execution of the programs marketing strategy, this may include, but not limited to:
  - Recruiting alumni and current participants to assist at recruitment events
  - Planning and executing recruitment events (information sessions, open houses)
  - Represent Ivey at information sessions and special events as an information resource.
- Arrange class visit for prospective clients
- Monitor the inventory of collateral materials.
- Arrange approx. 70 information sessions and recruitment events in the Greater Toronto Area. Prepare and send materials for all sessions and events. Make travel arrangements when requested.

---

**NO. OTHER DUTIES (less than 10%)**


---

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)	
Not Applicable				

---

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

- Training and guidance for new employees (**occasional**)  
– no regular supervision; provide some guidance and training to part-time assistants
- 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	√ Complete composition	Composition of email messages, faxes, letters to external contacts related to duties and responsibilities Individual correspondence (email messages, faxes, letters) with program inquires and applicants.
	√ Partial composition with general direction (verbal or written)	Announcement and notices to program inquires and applicants Application guidelines and related application and evaluation forms Preparation of agendas and other materials as required Revising and updating communication templates
Reports	√ Prescribed format	Compiling data and generating reports related to recruiting and admissions. Create tracking reports that identify prospects for follow-up

---

5) WHAT ARE THE **MINIMUM** SKILLS, EDUCATION, SPECIAL TRAINING AND/OR EXPERIENCE

## REQUIRED TO PERFORM SUCCESSFULLY THE DUTIES OF THIS POSITION?

The Richard Ivey School of Business is Canada's premier business school, recognized worldwide for the quality of its management degree programs. To be successful in a highly competitive environment, it is essential that staff provide outstanding customer service and are committed to excellence in all activities. The EMBA Program Office is a fast-paced, high volume environment, dealing with a demanding client base and is best suited to individuals who take a calm and methodical approach to their work.

**Quality and customer service:** A commitment to exceptional customer service is essential to put the customer first in all activities and to anticipate and exceed customer expectations. The incumbent must be committed to and excel in quality and customer service in all internal and external contacts on the telephone, by email and in person. The incumbent must also have a strong knowledge of the programs and services offered by the Ivey Business School and the University

**Marketing and sales skills:** Must be professional, articulate, positive and enthusiastic, with the ability and desire to be successful in a sales and marketing function.

**Team player:** To contribute to the overall effectiveness of the Executive MBA Program Office. Staff must effectively handle all activities as they pertain to their duties and responsibilities. Work cooperatively in a team by assisting all co-workers with any task as required. Team atmosphere is developed by every staff member being aware of the deadlines of others and by being sensitive to times when help is needed.

**Interpersonal and communication skills:** Communication (both verbal and written), listening, and interpersonal skills are critical qualities to possess in order to perform the many duties of the position which require interaction and communication with others both internal and external to the department. A professional telephone manner is essential. Able to deal knowledgeably and effectively when dealing with the public, potential candidates and current participants and faculty of the Executive MBA programs. Exhibit a pleasant and professional manner, maturity, tact and diplomacy in all internal and external contacts. Able to maintain strict confidentiality concerning applicant and participant records.

**Time management skills:** Be extremely well organized to anticipate, plan and balance multiple priorities with many interruptions; able to meet and to cope with the stress of deadlines. Timeliness in completing all activities is also critical to maintaining superior customer service. Must be flexible to adapt to last minute changes, i.e. changes in details and deadlines.

**Adaptability:** Exhibit flexibility to adapt responsibilities and take on new assignments to meet the changing priorities of the Executive MBA programs.

**Planning and problem-solving skills:** Be results oriented; plan and implement the various procedures; anticipate potential problems and take appropriate measures to solve them. Ability to use good judgement, and to take the initiative to resolve problems with minimal direction.

**Computer skills:** Need strong Microsoft Office (i.e. Word, Excel, PowerPoint) skills; database management (i.e. Maximizer); have the desire and ability to thoroughly learn, understand and apply web-based applications as used in Ivey (IRIS, Applicant Viewer, eZone, etc.) and UWO (PeopleSoft). Must be technically strong to maintain and to problem solve using large databases, to create and modify own reports, and to work with on-line processes. Ability to adapt to and implement emerging technology. Also have a flair for creative and professional presentation on letters, reports and forms.

**Attention to accuracy and detail:** Accuracy and consistent attention to detail are essential to ensure that the correct information is conveyed to the applicants, participants, faculty and internal departments and external agencies via email, in writing, in person and on the telephone and that this information is consistent with Business School, Senate and University policies. The incumbent must also be committed to keeping informed of new procedures within the department, Ivey and UWO.

## MINIMUM REQUIREMENTS

This position requires a university degree, at least five years related experience in a service and team-oriented environment. The candidate must be prepared to work additional hours during peak periods and with restrictions on vacations at certain times of the year.

---

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

All staff are expected to carry out their assignments at a high level of efficiency and with minimal supervision in the office as well during class and residential sessions since the Executive MBA Program Services Director and Executive MBA Program Director are often unavailable due to appointments, teaching, meetings, or recruiting sessions. Supervision consists of the daily delegation of tasks, setting goals and objectives, and the review and referral of unusual and complex issues to the Program Director.

---

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

Problems:

- Independently identify and solve a variety of administrative and service issues including but not limited to: liaise with program inquirers and applicants, the applicable departments within Ivey and the University, outside agencies and facilities for the purpose of obtaining and exchanging information and responding to problems.
- Apply knowledge to effectively provide quality administrative support, service and guidance to our client. Knowledge of the program positioning, application process and admissions criteria.
- Determine how, when and to whom information should be distributed.
- Make daily operation decisions and resolve administrative problems within guidelines. Answer queries and produce and distribute information material. Refer more complex problems to the program directors.

Inquiries:

- Inquiries from individuals about the program
- Inquiries from individuals regarding the application process.

---

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

- Decisions and problems with budgetary impact
- Unusual or complex issues pertaining to any of the above activities are referred to the Executive MBA Program Services Director or Program Director.
- Technical questions outside the realm of permission that directly affect participants, faculty, etc. are referred to the IT Department.

9) WHAT ACTIVITIES DO YOU PLAN OR ORGANIZE? PLEASE INDICATE THE LENGTH OF TIME INVOLVED (e.g. daily planning of assigned work, monthly ...) *Note: Activities undertaken vary monthly and are dependent on the recruitment and admissions cycle. Percentages given are approximate only and may vary considerably each month.*

- Respond to inquires – 50 per day (email, phone and in-person)
- Plan and organize operational functions or processes – daily through-out the year
- Plan and organize recruitment events – monthly during the school year

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

CONTACT	LOCATION	FREQUENCY	PURPOSE
Potential Executive MBA candidates; middle to senior corporate managers and professionals	External	Daily	Communicate and provide information, answer questions, provide guidance etc.
Executive MBA applicants; middle to senior corporate managers and professionals	External	Daily	Communicate information and provide information, answer questions, provide guidance etc.
Other members of the Executive MBA office staff	Internal	Daily	Interaction related to duties and responsibilities, consultation, provide support for one another during peak periods.
Human resource professionals and corporate sponsors	External	Weekly	Provide program information and answer any questions sponsors may have
Ivey Staff and Faculty	Internal	Weekly	Finance department re: hotel payments, Admin support, other departments and faculty re: general questions (account #'s, program details, etc.) and obtain and share information to enhance efficiency of the Executive MBA programs Marketing re: marketing materials IT re: technological issues
FGS and Registrar's Office	Internal	Weekly	Issues related to UWO systems (PeopleSoft) including admitting and enrolling students within the UWO systems.
Suppliers involved in development and production of marketing materials	External	Monthly	Proofread, provide quantities, co-ordinate production of marketing materials
Facilities	Internal	Monthly	Coordination and planning of recruitment events (discuss details, review and return contract)

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

Staff Member:

Signature W. Colter

Date July 13/09

Supervisor: John-Derek Clarke

Signature [Signature]

Date July 27/09