

**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: VAL DUKESHIRE
Title: RECORDS CLERK
Phone: 88914
Email: vdukeshire
Department: PHYSICAL PLANT

(B) Position Information:

Current Incumbent: VAL DUKESHIRE
Current Classification: CLERK 4
Classification Being Appealed: CLERK 4
Date Evaluation Results Letter Received: FEBRUARY 25, 2011

(C) Information Required For Job Evaluation Appeals Committee

Reason for the appeal: I am appealing this ruling
as this position has surpassed the
responsibilities of the Manager of Accounting.
This position records card requests
to request funds within and outside
of the University community whereas
before it could only do the absence
of the Manager of Residence Operations,
Accounting & Services
Supervisor duties are performed regularly
whereas before no supervisory duties
were performed.
The title of the position does not
reflect the true nature of this
position.

Supporting Information (Optional):

(Attach an additional page if more space is required)

(D) Approvals:

Signature of Person Appealing: Val Dukeshire Date: March 8, 2011

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: Physical Plant
Dept. Num. 440110
Incumbent: Val Dukeshire
Citite Mem.Present: UWOSA: K. Foullong, L. Johnson, M. Parker,
 ADMIN: J. Asuncion, C. Bumbacco, C. Zrini

Job Title: Admin. Asst
Eval. Date: Apr-11

| I | FACTOR | COMMENTS | SUB FACT | DEGREE | PTS | Profile | | |
|------|-----------------------|---|----------|--------|-----|---------|---|---|
| | | | | | | - | = | + |
| I | Job Knowledge | College diploma or university degree 3 - 5 years of experience. Western specific procedures - PeopleSoft, Avanti | Educ | 4 | | | | |
| | | | Exper. | | | | | |
| II | Initiative | Generally regulated. Works independently but there are established methods for work reporting, payments and schedules | | G | 165 | | | |
| III | Complexity/Judgement | Standardized but a variety of activities. Choice of action but standard practices and policies | | 3 | 35 | | | |
| IV | Contacts | Regular contact with public. Exchange information, provides advice, scheduling deliveries | | 3 | 25 | | | |
| V | Errors | May not be detected until outside department. Embarrassment if work not completed or misbilled | | 3 | 45 | | | |
| VI | Supervision of Others | No direct reports | Char. | 1 | | | | |
| | | | Scope | Any | 5 | | | |
| VII | Effort/Demands | Regular periods of high volume. Financial dealines, etc | | 2 | 30 | | | |
| VIII | Physical Environment | Normal office environment | | 1 | 10 | | | |

CLASSIFICATION ASSIGNED

Total Pts: 360

Group: Administrative Assistant

Level: 10

Co-Chair Signatures: UWOSA: Mike Parker

ADMIN: Chris Bumbacco

**POSITION DESCRIPTION
QUESTIONNAIRE**

**THE UNIVERSITY OF WESTERN ONTARIO
EMPLOYEE RELATIONS**

SOCIAL INSURANCE NO. 010009249 PRESENT INCUMBENT SURNAME DUKESHIRE INITIALS VJVALEP.E POSITION IDENTIFICATION DEPT. NO 440110 P.S. JOB CODE 504

BASIC POSITION INFORMATION

DEPT. NAME PHYSICAL PLANT
SECTION NAME CARETAKING SERVICES
LOCATION SUPPORT SERVICES BUILDING
WORK WEEK HRS. 35

| | |
|-------------------------------|--------------------------------|
| FOR SALARY ADMINISTRATION USE | |
| CLASS'N | <u>Clerk 4</u> |
| CLASS'D | <u>02/11</u> EFFECT <u>NIC</u> |
| ANALYST | Date <u>sup</u> Date |

SUPERVISOR SURNAME JEARY MINLER INITIAL G.M. PHONE 661-2111 EXT 88733

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.)

2. MAJOR DUTIES %

- 50%) - Reporting directly to the Manager of Caretaking, the incumbent acts as a resource person to provide effective operation of all support functions to the Managers of Caretaking, Supervisors and their Leads.
 - Responsibilities include: assisting with communications (e-mail, telephone), scheduling meetings, provide updates on operating accounts, creating forms and spreadsheets.
 - Contact suppliers to obtain quotes on materials and equipment, processing of purchase orders, contacting suppliers to investigate discrepancies with material ordered or service provided, taking steps to correct the discrepancies.
 - Inform Managers, Caretaking Services of steps taken, resolution and identify process improvements. Liaise between customer and supplier to ensure service is provided as needed. Responsible for ensuring payments to a supplier are made in a timely, accurate and efficient manner.
- 15%) Provides support to the Caretaking Manager's for the caretaking budget which includes monitoring, compiling monthly General Ledger reports. Investigates any discrepancies and creates and enters journal entries to correct any errors.. Provide the same support to other Divisional teams, i.e., Project Team
- 10%) Coordinate service request quickly, analyze situations and immediately dispatch appropriate people required to resolve service requests or, if routine request, plan work and schedule (trade, priority, time required, etc.)
- 5%) Visa Coordinator for Campus and Residences caretaking charges, ensuring invoices are directed to the appropriate account. reconcile Pcard charges made by Residence Manager and Building Supervisors.
- 5%) Create a master schedule for staff movement during critical cleaning times (Restorative cleaning, Summer Conferences.). Reorganize and endeavor to accommodate last minute changes. Coordinate supplies needed for this period. ensuring delivery of goods is made on time.
- 5%) In the absence of the Managers, Caretaking Services receive and respond to service requests and inquiries from the University Community visitors, Divisional staff and general public by telephone
- 5%) Act as Resource person for the Service centre to receive and respond to service requests and inquiries from the University community visitors, divisional staff and general public by telephone

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OTHER DUTIES (less than 10%)

- Responsible for weekly input of work orders into the system for plumbing and electrical repairs at Platt's Lane Estates
- Coordinate with the Lead Hand of the carpenter shop for the monthly carpentry repair at Platt's Lane Estates and sets up work orders for this work monthly
- Responsible for tagging new equipment for inventory and arranging for the shipment of the equipment to the proper buildings
- Prepares a spreadsheet and records information concerning keying for new buildings
- Books meetings for Building Supervisors
- Provide Campus Building Supervisors with classroom schedules twice a year
- Provides Project Coordinators with information on availability of classrooms on campus
- Weekly Project Crew meeting minute taking
- Create a spreadsheet and track cost for summer painting in the residences, apartments and townhouse
- Coordinates with Pest Control Services and Building Supervisors when service is required
- Responsible for sorting and distributing Building Supervisors' mail on a daily basis
- Provides informal training on Avantis, Peoplesoft, Bigmac and Excel for Building Supervisors on request
- Responsible for notification of service interruptions when the Manager of Residence Caretaking is away.
- Responsible for updating the Residence Damage and Loss Book yearly
- Maintaining an effective filing system
- Creating invoices for damages created by tenants in apartments and sent to the Assistant Director, Housing Services & Manager Parking Services

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) | |
| | | | | |

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 |
|---|--|---|
| | <input checked="" type="checkbox"/> Complete Composition | Memos, letters, invoices, spreadsheets, schedules, forms |
| <input checked="" type="checkbox"/> Corres- x pondence | <input checked="" type="checkbox"/> Partial composition with general <input checked="" type="checkbox"/> direction (verbal or written) <input checked="" type="checkbox"/> Prescribed format | |
| <input checked="" type="checkbox"/> Reports | <input checked="" type="checkbox"/> Complete composition | Conference Linen spreadsheets, budget spreadsheets, schedules, project spreadsheets |
| <input checked="" type="checkbox"/> Other: | <input checked="" type="checkbox"/> Complete composition <input checked="" type="checkbox"/> Partial composition ... <input checked="" type="checkbox"/> Prescribed format | Damage & Loss Book, Forms, Building Key Code Forms, Caretaking schedules |

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

per J. Minter College diploma or university degree, 3-5 years experience (d-rac)

Strong computer and proof-reading skills using Excel, Word, Outlook, Internet Explorer, Corel WordPerfect, PeopleSoft Financials, Avantis, Wellnet Solutions and Big Mac

Excellent organizational and time management skills, accuracy and attention to detail, an ability to manage multiple priorities effectively

Ability to work independently and as part of a team

Ability to maintain detailed records ensuring accuracy while dealing with frequent interruptions

Strong knowledge of University of Western Ontario procedures

Strong mathematical skills and knowledge of accounting/bookkeeping procedures

Ability to exercise discretion, judgment, initiative and maintain confidentiality

Excellent customer service skills

Ability to deal with outside suppliers, contractors and general public

Excellent communication skills, both oral and written

Excellent interpersonal skills

per J. Minter Experience in University environment (3-5 years).

PLEASE DESCRIBE THE NATURE AND FREQUENCY OF THE SUPERVISION YOU RECEIVE

Works independently with minimal supervision

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

Liaise with suppliers to reconcile shipments of supplies - daily
 Create work orders - daily
 General inquiries from University Community or general public regarding University or Division - daily
 Journal input - daily
 Invoice payment review for approval - daily
 Order supplies for all caretaking - daily
 Provide Building Supervisors, caretakers, trade supervisors, project coordinators with support i.e. project cost - daily
 Services and supplies enquiries (invoicing, delivery, inventory, distribution and discrepancies) - daily
 Scheduling restorative labour and material
 Summer Conference reconciling usage and invoicing of linen
 Track budgets \$14,000,000. - daily
 Track project cost - daily
 Visa reconciliation - monthly

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

- Enquiries that deal with problems relating to Personnel
- Complaints of a significant nature from customers
- Excessive budget deviations

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

| | |
|--|---------|
| Create and input journal entries | Daily |
| Create Work Orders | Daily |
| Create material and service requisition | Daily |
| Track Supplier requisitions | Daily |
| Restorative Cleaning Schedules | Daily |
| Prioritize service requests and prepare work orders for scheduling | Daily |
| Provide minute taking for Project Crew and prepare report | Weekly |
| Reconcile Visa | Monthly |
| Prepare and monitor budget reports | Monthly |

- 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 (day wkly mthly) | PURPOSE OF THE COMMUNICATION (e.g. to provide information concerning...) |
|---|---|---|-------------------------------|--|
| UWO Community | X | X | X | Respond to incoming queries: responding to incoming requests and inquiries and working to resolve any related problems/issues |
| Division Staff | X | | X | Effective operation of support functions to Campus and Residence Caretaking Managers, Project Crew, Building & Trade Supervisors (E.g. create work orders, requisitions, journals, schedules, forms; computer support, budgets, project information, inventory control, etc. |
| Contractors/Suppliers | | X | X | Queries on purchase orders, invoicing, delivery schedules, MSDS sheets, deficiencies, etc. |
| Public | | X | X | Receives queries about the University and responds in a knowledgeable and professional manner |

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

Staff Member:

Paul Dukeshire

Jan 18/10

Present Classification

Signature

Date

Supervisor:

J. M. G.

2011 01 18

Signature

Date