

**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: _____ Heidi Van Galen _____
Title: _____ Executive Assistant to the Director _____
Phone: _____ 25255 _____
Email: _____ hvagalen@robarts.ca _____
Department: _____ Robarts _____

(B) Position Information:

Current Incumbent: _____ Heidi Van Galen _____
Current Classification: _____ SG 11 _____
Classification Being Appealed: _____ Yes _____
Date Evaluation Results Letter Received: _____ July 25, 2011 _____

(C) Information Required For Job Evaluation Appeals Committee

Reason for the appeal:

I feel my position is under rated due to:

- Level of Independence
- Level of responsibility
- Level of confidentiality, discretion required
- Level of interactions with internal, and external sources
- Independently prioritize competing demands from the many people/groups that I support, without direction from my supervisor
- Extensive knowledge of UWO policies/procedures and services
- Level of knowledge, understanding and responsibility for HR functions

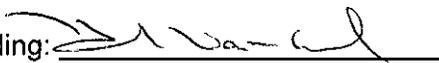
- Compared to my last position (SG12), I feel this current position is more challenging, and contains higher levels of the items mentioned above.

- I feel this current position compares, in terms of responsibility, knowledge/skills required, and independence, with the Administrative Officer (SG 13) position that I had with CIHR-III.

Supporting Information (Optional):

(Attach an additional page if more space is required)

(D) Approvals:

Signature of Person Appealing: _____  _____ Date: _____ July 29/11 _____

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

2002/05/27

AUG 11 2011



September 27, 2011

UWOSA Job Evaluation Appeals Committee
Human Resources Division
Support Services Building, Suite 5100

To UWOSA Job Evaluation Appeals Committee:

RE: Evaluation Appeal from Heidi Van Galen

Heidi is an Administrative Assistant in the Robarts Research Institute providing administrative support to a number of central areas. This includes providing support to the Operations Officer, Health & Safety Officer, one Robarts Scientist and the Interim Scientific Director. Heidi's situation is unique as her role has changed since she was transferred to Robarts in November 2009. Initially, her primary role was to provide high-level administrative support to the Institute Scientific Director but for the past 15 months, that role has been vacant. The Dean of the Schulich School of Medicine and Dentistry has been filling the role of Interim Scientific Director and his primary administrative support staff are housed within the Dean's office.

When Heidi started at Robarts, the position was evaluated as a SG11. The changes in the role were reflected in the PDQ recently evaluated as a SG11. I feel this classification is reflective of the role.

There are currently 11 Administrative Assistants in Robarts who provide administrative support to faculty (Scientists and scientific groups). All of these roles provide the same type of support with small variances. Heidi's role is different and I've summarized the primary activities of her role specifically below:

- Provide general administrative support to one scientist (Dr. MacDonald) as required such as assisting with expense claims, travel arrangements, scheduling meetings, and coordinating completion of HR forms for lab staff including recruitment of non RF employees, new student hires, orientation, and access to Robarts, for above noted Scientist.
- Coordinate Institute functions such as Bar-b-que's, town hall meetings, seminars, and the J. Allyn Taylor International Prize in Medicine nomination process and symposium.
- Day to day functions including mail, maintaining files, direct calls and receive visitors, completion of correspondence, reports, and other forms of

Robarts Research Institute

P.O. Box 5015, 100 Perth Drive, London, Ontario, Canada N6A 5K8 TEL: (519) 663-5777 Fax: (519) 663-3789 www.robarts.ca

communications.

- Responsible for accurate entry of Robarts weekly payroll.
- Enter vacation usage on the Schulich PDB for Robarts central admin staff (~33 employees).
- Coordinate all aspects of meetings as requested including scheduling, agendas, and recording minutes.
- Monitor and track Health and Safety training for all Robarts personnel, follow up with those who are overdue, and advise the Health and Safety Officer and employee supervisor when training is complete.
- Maintain office equipment and ordering of supplies. Submit purchase order requisitions for supplies as requested.

Without a full-time Scientific Director to support, the high-level administrative tasks are no longer required but with the added tracking of H&S training, weekly payroll, vacation tracking, and Institute functions, I feel the classification of SG11 is reflective of the role.

If the Committee requires additional information to clarify the Administrative Assistant role currently filled by Heidi Van Galen at Robarts Research Institute, please contact me directly.

Sincerely,



Linda Chapman
Operations Officer

cc. C. Zrini

TECHNICAL EVALUATION F

**UWOSA JOB EVALUATION RECORDING FORM
Office support positions**

Dept: Robarts Research Institute

Dept. ID _____

Job Title Administrative Assistant

Jobcode _____

Incumbent: Heidi Van Galen

Eval. Date: 09-Nov-11

Citte Mem.Present: UWOSA: L. Johnson, J. Millette, M. Parker,
ADMIN: J. Asuncion, L. Brock, C. Bumbacco

	FACTOR	COMMENTS	SUB FACT	DEGREE	PTS
I	Job Knowledge	University degree or college diploma More than 2 years experience	Educ	4	140
			Exper.	F	
II	Initiative	General policies - definite objectives. Incumbent goes ahead using accepted policy / standards		4	55
III	Complexity/Judgement	Wide variety of activities - supporting many others. Specific objectives		4	35
IV	Contacts	Securing cooperation of external representatives. Exchange information		3	45
V	Errors	Procedural errors. Causing delays, embarrassment. Could disrupt work of others		3	45
VI	Supervision of Others	Work study	Scope	2	10
			Char.	A	
VII	Effort/Demands	High work volume. Support for Health and Safety training requirements		3	60
VIII	Physical Environment	Normal office		1	10

CLASSIFICATION ASSIGNED

Total Pts: 400

Group: Administrative Assistant

Level: 11

Co-Chair Signatures: UWOSA: Mike Parker

ADMIN: Chris Bumbacco

**POSITION DESCRIPTION
QUESTIONNAIRE**

**THE UNIVERSITY OF WESTERN ONTARIO
EMPLOYEE RELATIONS**

PRESENT INCUMBENT		POSITION IDENTIFICATION	
SURNAME	INITIALS	DEPT. NO	P.S. JOB CODE
<u>Van Galen</u>	<u>H. M.</u>	<u>380200</u>	<u>SA6X21</u>

BASIC POSITION INFORMATION

DEPT. NAME Robarts Research Institute

SECTION NAME Office of the Scientific Director

LOCATION Robarts

WORK WEEK HRS. 35

FOR SALARY ADMINISTRATION USE	
CLASS'N	<u>Admin Assistant (SG 11)</u>
CLASS'D	<u>07/11</u> EFFECT <u>N/C</u>
	Date Date
ANALYST	<u>SDV.</u>

SUPERVISOR SURNAME: Chapman INITIAL L PHONE X 25205

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	90%
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- Reports directly to the Operations Officer (OO)
- Works independently but is also part of the Office of the Scientific Director (OSD) Administration Team
- Meets regularly with OO to keep up-to-date on activities / functions of the OSD at Robarts Research Institute and to receive priority projects
- Supports the Interim Scientific Director, Associate Director, External and Associate Director, Internal as well as the Robarts Executive Committee with administrative support for issues pertaining to their Robarts leadership roles
- Interacts with all functional areas within Robarts, the University and within administrative areas of the LHSC and the external community

Administrative Duties:

For the Interim Scientific Director (SD): 30%

- Working with the Executive Assistant to the Dean of Schulich to assess requests for the Interim Scientific Director's time, responding appropriately to scientists, staff, external organizations and others on behalf of the Interim Scientific Director
- Responsible to prepare and/or provide material that is pertinent to for Robarts Related business on next week's schedule, including agendas, minutes of meetings, follow-up and other data
- Responsible to provide relevant information and materials as required on issues and topics that require the Interim Scientific Director's attention
- Schedule, plan and attend in order to take minutes at the Robarts Executive Committee Meetings
- Manage sensitive matters, maintain strictest confidentiality and discretion regarding topics discussed at Executive Committee meetings
- Schedule, plan and organize quarterly Town Hall meetings and Scientist meetings as required
- Schedule, plan and organize document collection and dissemination for Robarts External Reviews (including liaising with external reviewers for schedule and travel arrangements, booking venues, arranging catering and all event logistics)
- Working with the Chair of the Credentials Committee, set up annual credentialing review meetings (compilation and dissemination of CVs, create schedule for meetings incorporating Robarts Group Directors and Department Chairs, arrange catering, take minutes, assist with result letters to scientists, group directors and dept chairs)
- Project manager for social functions associated with the Robarts, i.e. special event dinners, staff BBQ's, holiday celebrations, toy/food drives etc.

- Editor-in-Chief of the weekly Robarts E-newsletter, as well as other Institute wide communications as required
- Respond to inquiries and phone calls from both internal and external sources
- Facilitate the signing of contracts and letters as required for Robarts
- Review and prioritize all mail and respond as required
- Maintain an effective filing system both hard copy and electronic
- Provide administrative support

For the Associate Director, External (ADE):

25%

- Project manager for the Robarts Seminar Series (solicit potential names from Robarts Scientists and organize all event logistics - liaise with the visiting guest speaker to arrange travel/ accommodation/ equipment, set up individual meetings with Robarts scientists, arrange catering/reservations, distribute itineraries and ensure expenses are in alignment with budget limitations)
- With directive from the Taylor Prize Committee organize the annual J. Allyn Taylor Prize Symposium and Poster Competition (including researching and selecting appropriate advertising mediums, sending out calls for nomination (both mass and targeted), liaising with external reviewers, coordinating webpage edits, preparing symposium programs, organizing speaker travel arrangements, venue and catering arrangements, and organizing the poster session logistics and liaising with students/post docs, etc.)
- Project manager for the Gairdner Faculty & Student Lectures (including coordinating advertising, organizing speaker travel arrangements, venue and catering arrangements, directional signage, and logistics etc. and ensure in expenses are in alignment with budget limitations)
- Special projects as assigned

For the Occupational Health and Safety Officer

15%

- Monitor and track Health and Safety training for all Robarts personnel, follow up with those who are overdue, and advise the Health and Safety Officer and employee supervisor when training is complete.
- Follow up with the scientists on all noncompliance orders as directed and track confirmations once compliance order has been completed, advising Health and Safety Officer.
- Assist with publishing Quarterly Robarts Health and Safety E-Newsletter.
- Special projects as assigned

For the Operations Officer (OO):

10%

- Project manager for scientific retreats including booking venue, catering, circulating agenda, taking minutes, etc.
- Complete purchase order requisitions, cheque requisitions, etc. as directed
- Point person for inquiries from Robarts administrative staff regarding Robarts administrative processes
- Organize, compile agenda items and take minutes at the Science Administrative Assistants' monthly meetings
- Organizational contact for external vendors wanting to book meeting room space at Robarts (ensuring event logistics are received and forwarded to security for room set up and ensuring deposits and full payments are received prior to booking date)
- Request and enter vacation and sick day usage for all Robarts staff who are not allocated to a specific group as well as for those who enter in the information for own respective area, including ensuring special consideration letters are received for those who exceed vacation allowances
- Reconcile expenditures for the OSD general ledger accounts
- Special projects as assigned

For Dr. John F. MacDonald:

10%

- Assesses requests and schedule meetings from students for the Dr. MacDonald's time
- Maintain his schedule updating it for daily and yearly activities (including religious holidays, STATs, etc.)
- Responsible for travel arrangements, booking accommodations, preparing data for all trips as required and recording them on schedule (departure, arrival time, flight number, hotel confirmation number, etc.)
- Complete registration and payment for meetings and conferences
- Complete travel expense claim forms ensuring accuracy and follow up to ensure payment is received
- Compose contracts and complete payroll and building access documents as required for renewal of staff, new hires and students
- Schedule and organize scientific retreats as required (including all event logistics - liaise with visiting guest speakers to arrange travel/ accommodation/ equipment, arrange venues/catering/reservations, distribute itineraries and ensure expenses are in alignment with budget limitations)
- Edit and maintain Robarts scientist profile webpage
- Provide administrative support as required

NO.

OTHER DUTIES (less than 10%)Weekly Payroll:

- Responsible for timely and accurate entry of Robarts weekly payroll
- Responsible to calculate and accurately enter statutory holiday pay and statutory holiday overtime pay for Robarts weekly payroll

Website:

- Edit and maintain Robarts web pages as required or as requested

Additional duties:

- Maintaining filing system, photocopying, faxing, courier and mailings, etc.
- Supervise, train and assign work duties to work study students
- Other duties as assigned

- 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)	

N/A

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

Provide training and guidance to Robarts Administrative staff for web site edits/updates/changes.

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	Letters, emails, advertising events as assigned
	<input checked="" type="checkbox"/> Partial composition with general direction (verbal or written)	
	<input checked="" type="checkbox"/> Prescribed format	Various forms as required
Other: <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Complete composition	Posters, brochures, Newsletters, announcements
	<input checked="" type="checkbox"/> Partial composition	
	<input checked="" type="checkbox"/> Prescribed format	

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

Education:

University Degree or Community College diploma in an administrative / business program

Experience:

5+ years in a senior executive assistant role

Required expertise:

- Strong verbal and written communication skills
- Exceptional interpersonal skills including the ability to maintain composure when dealing with difficult situations
- Strong computer and proof-reading skills using Microsoft Office (Word, Excel, PowerPoint), Outlook, Internet, Explorer, Photoshop, web site edits, etc.)
- Strong organizational skills, ability to prioritize and multi-task adapting quickly to changing goals, tight deadlines, and fluctuating workloads
- Ability to work independently and as part of a team

- Ability to maintain detailed records ensuring accuracy while dealing with frequent interruptions
- Display initiative and judgement when dealing with staff and members of the public using absolute discretion and tact
- Maintain confidentiality in all matters relating to the SD, ADE, ADI and OO
- Knowledge of the PeopleSoft Financial and Human Resource systems an asset
- Knowledge of UWO policies and procedures an asset
- Flexibility (overtime may be required)

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

Works independently but is also part of the Office of the Scientific Director (OSD) Administration Team and meets regularly with OO for priority assignments and to keep up-to-date on activities / functions of the OSD at Roberts Research Institute. Meets as required with the Interim Scientific Director, Associate Director, External and Associate Director, Internal for assignments. Works independently to prioritize and complete all assignments. Various team projects as assigned by the OO throughout the year.

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

- Prioritizing competing demands on time from those supported
- Office equipment malfunction
- Supplies ordering
- Phone or mail enquiries
- Conflicts with room bookings and scheduling

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

- Discrepancies with expenditures, expense claims, and other accounting errors for the OSD

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

- J. Allyn Taylor Prize Symposium and Poster Session (annually)
- Gairdner Lecture (annually)
- Roberts Seminar Series (monthly)
- Credential Reviews (annually)
- External Reviews (as required)
- Scientific Retreats (annually or as required)
- Town Halls (quarterly or as required)
- Scientist meetings (quarterly or more frequently as required)
- Executive Committee meetings (monthly)
- Science Administrative Assistants meetings
- Social events – BBQ's, holiday parties, charity events (monthly and as required)
- Maintain various contact lists (as required)
- Manage travel and itineraries for visitors/speakers as required (monthly and as required)

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...)
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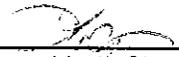
- interact with Roberts scientists, staff, and students at Roberts and UWO Finance, President's office, Deans Office, Human Resources, various faculties as well as various departments at LHSC.
- Interact with visiting local, national or international scientists
- network with a plethora of catering companies, hotels, travel agents, rental car agencies and other external company representatives.

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

Staff Member:

Present Classification: Administrative Assistant Signature _____ Date _____
SG 11

Supervisor:

Signature  Date June 23, 2011
Linda Chapman

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

- 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.
- 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

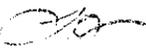
- A change in duties and/or responsibilities does not automatically imply a change in classification and salary.
- A job description is not intended to measure an increase in the volume of work; rather it should only reflect the areas of responsibilities and the nature of duties.

Please complete below and forward with the Questionnaire.

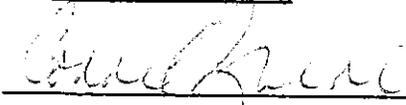
Reason(s) for requested review

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

Routing approvals: I agree that this review is required

Immediate supervisor: Linda Chapman 

Department Head: Dr. Michael J. Strong JUN 23 2011

Dean's Office 

Date JUN 23 2011