

**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: STACEY BASTIEN
Title: Administrative Assistant
Phone: 471-6006 (currently on Mat Leave)
Email: stacey.bastien@schulich.uwo.ca
Department: Dentistry

(B) Position Information:

Current Incumbent: Stacey Bastien
Current Classification: SG11
Classification Being Appealed: SG11
Date Evaluation Results Letter Received: Oct 17/05

(C) Information Required For Job Evaluation Appeals Committee

Reason for the appeal: PLEASE SEE ATTACHED

Supporting Information (Optional):

(Attach an additional page if more space is required)

(D) Approvals:

Signature of Person Appealing: [Signature] Date: Jan 23/06

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

Appeal of Position Classification for Employees Covered
by UWOSA Collective Agreement (Stacey Bastien)

(C) Information Required for Job Evaluation Appeals Committee (Supporting Information)

Reason for the Appeal: The following is the list of added duties/responsibilities to my job description as originally stated in my job evaluation. I believe my appeal is warranted not only because of the increase in workload but also the accountability of the work I do. Many of these responsibilities are mine alone from start to finish.

- 1 Assists the Appointments Committee with circulation of prospective faculty information and processes approval;
- 2 Organizes all Faculty and Staff receptions, workshops and seminars (ie. invitations, meals, room bookings), including travel arrangements for guest speakers;
- 3 Assists with Awards issued to Faculty and Students (ie. Wesley and Jean Dunn Fellowship, C.Y. Lung Award, W.W. Wood Award);
- 4 Acts as support person for major projects (ie Strategic Plan – 5 Year) which includes liaising between external consultants, faculty, staff and students. Maintains all documentation and records. Coordinates all related meetings and conferences. Distributes all documentation accordingly;
- 5 Delegates to and monitors the workload of the Secretary (ie. Filing, Correspondence, Outgoing Mail);
- 6 Oversees Payroll processes for the School;
- 7 Coordinates arrangements for the post-graduate dental clinic fellowship program with teaching hospitals, which entails coordinating selection processes and recovering funds to cover salaries;
- 8 Coordinates the Adjunct Clinical Professor appointment process;
- 9 Compiles and distributes information and material to faculty pertaining to merit evaluation and development, scheduling subsequent interviews and typing summaries of related discussions;
- 10 Assists with preparation of faculty dossiers and materials for promotion and tenure, maintains current committee membership lists;
- 11 Coordinating meetings with the Dean and Director to meet with Promotion and Tenure track faculty and organize all paperwork involved in this process;
- 12 Prepares all documentation related to Staff Appointment Notice, Faculty Appointment Notice, GRA Appointment Notice, GTA Appointment Notice, Leave/Irregular Work Week Form, Non-Continuing, Non-Employment Remuneration Appointment Notice, Post-Doctoral Fellow Appointment Notice, Termination Notice, Work Study Student Appointment Notice, Academic Administrative Post Appointment Notice;
- 13 Assists with the faculty recruiting and appointment process;

Appeal of Position Classification for Employees Covered
by UWOSA Collective Agreement (Stacey Bastien)

- 14 Investigates all payroll related concerns on behalf of faculty and staff and advocates when necessary;
- 15 Advices Faculty of Teaching and Service Workload for the upcoming Academic Year (as per Clause 5.2.1, Workload Article of the Collective Agreement).
- 16 Assists the Student Affairs Officer with arrangements for special functions and receptions including awards ceremonies and convocation.
- 17 Assists the Student Affairs Officer and the Admissions Coordinator in the Admissions Weekend for potential dental students.
- 18 Assists the Assistant Director, Alumni Affairs and Secretary in correspondence with Alumni and Donors (ie. Ontario Dental Association events, Alumni Newsletter and Alumni of Distinction Award).
- 19 Assists the Chair and Administrative Assistant in the Division of the Qualifying Program with the faculty and staff contracts for the Summer Clinic and the Prior Learning Assessment

I apologize for the delay in sending this to you. I started my Maternity Leave on October 28th and I had my baby on October 30th, therefore, life has been hectic.

I look forward to hearing from the JEAC. Please note that you can contact me by email at stacey.bastien@schulich.uwo.ca or by phone at 471-6006 for any questions you may have.

Sincerely,

A handwritten signature in cursive script that reads "SBastien".

Stacey Bastien

UWOSA JOB EVALUATION RECORDING FORM

Office Support Plan

(APPEAL)

Dept: Dentistry
Dept. Num.:
Incumbent: Stacey Bastien
Citte Mem.Present: UWOSA: M. Broadfoot, M. Parker
 ADMIN: P. Grant, V. Smith

Job Title: Admin. Asst.

Eval. Date: 2006/06/16

	FACTOR	COMMENTS	SUB FACT	DEGREE	PTS	Profile		
						-	=	+
I	Job Knowledge	Post secondary required. 5 plus years	Educ	4				
			Exper.		F	140		
II	Initiative	Set policies and procedures in HR anf Finance. Initiave in Admin role		5		75		
III	Complexity/Judgement	Couldn't modify procedures		4		35		
IV	Contacts	Regular contact with public. Provides information		3		45		
V	Errors	Procedural erros, particularly payroll		3		45		
VI	Supervision of Others	Supervision of secretary, casual staff	Char.	2				
			Scope	A		10		
VII	Effort/Demands	Juggling several accountabilities at one time		2		30		
VIII	Physical Environment	Normal office conditions		1		10		

CLASSIFICATION ASSIGNED

Total Pts: **390**

Group: _____ Admin. Support _____

Level: _____ Salary Grade 11 _____

Co-Chair Signatures: UWOSA: M. Broadfoot _____

ADMIN: V. Smith _____

**POSITION DESCRIPTION
QUESTIONNAIRE**

**THE UNIVERSITY OF WESTERN ONTARIO
EMPLOYEE RELATIONS**

U.W.O. ID NUMBER _____ PRESENT INCUMBENT SURNAME Alan Bastien INITIALS AB POSITION IDENTIFICATION DEPT. NO 360100 P.S. JOB CODE SA6X21

BASIC POSITION INFORMATION

DEPT. NAME: Office of the Director
SECTION NAME: School of Dentistry
Faculty of Medicine and Dentistry
LOCATION: Room # 1003, Dentistry Sciences Bldg.
WORK WEEK HRS. : 35

FOR SALARY ADMINISTRATION USE

CLASS'N Administrative Assistant, SG 11
CLASS'D Sept 1/06 EFFECT RES
Date Date
ANALYST JCD

SUPERVISOR SURNAME: Pearce INITIAL: K. PHONE: 661-2111, Ext. 86142

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

ADMINISTRATIVE ASSISTANT TO THE DIRECTOR AND ADMINISTRATIVE OFFICER: (35%)

Provides administrative and secretarial support for the Director and the Administrative Officer:

- Responds to incoming telephone calls on behalf of the Director and Administrative Officer;
- Reviews and prioritizes incoming mail, re-directing and/or dealing with routine correspondence;
- Organizes and manages the Director's schedule, arranging for appointments and coordinating meetings;
- Anticipates information requirements, researches and gathers data to draft briefing reports in preparation for meetings and to respond to requests for data;
- Drafts and produces correspondence, reports, presentation materials, etc.;
- Prepares, schedules and coordinates activities pertaining to the recruitment of new faculty;
- Coordinates travel arrangements, prepares expense accounts;
- Acts as Secretary to the Council of the School of Dentistry and other standing committees such as the Annual Performance Evaluation Committee and Workload Committee, maintains mailing lists, prepares and distributes agendas/minutes of meetings;
- Assists the Appointments Committee with circulation of prospective faculty information and processes approval;
- Organizes all Faculty and Staff receptions, workshops and seminars (ie. invitations, meals, room bookings), including travel arrangements for guest speakers;
- Assists with Awards issued to Faculty and Students (ie. Wesley and Jean Dunn Fellowship, C.Y. Lung Award, W.W. Wood Award);
- Acts as support person for major projects (ie Strategic Plan – 5 Year) which includes liaising between external consultants, faculty, staff and students. Maintains all documentation and records. Coordinates all related meetings and conferences. Distributes all documentation accordingly;
- Delegates to and monitors the workload of the Secretary (ie. Filing, Correspondence, Outgoing Mail).

NO.	MAJOR DUTIES	%
1.	BUDGET AND ACCOUNTING	(15%)
	Assists the Administrative Officer with managing the School's financial activities:	
	<ul style="list-style-type: none"> • Maintains account files, records of expenses; prepares purchase requisitions and expense statements for Director's office and verifies Purchase requisitions and travel expense report forms for the Divisions of the School; • Prepares electronic journal entries and budget transfers; prepares cash deposits; • Prepares accounts receivable invoices; • Provides instruction on policies and procedures to divisional and clinical secretaries who are responsible for performing accounting activities on behalf of 15 cost centres within the School; • Maintains the School's 'Recognition Fund' and petty cash fund. 	
3.	PAYROLL ADMINISTRATION AND HUMAN RESOURCES MANAGEMENT	(40%)
	Responsible for the payroll for the School of Dentistry, which includes 38 full-time, 8 sessional and 14 contract administrative staff and 26 full-time and 16 part-time faculty. There are also 120 part-time clinical instructors paid on a per session basis throughout the year.	
	<ul style="list-style-type: none"> • Prepares weekly and monthly payroll requisitions; • Oversees Payroll processes for the School; • Coordinates arrangements for the post-graduate dental clinic fellowship program with teaching hospitals, which entails coordinating selection processes and recovering funds to cover salaries; • Coordinates the Adjunct Clinical Professor appointment process; • Compiles and distributes information and material to faculty pertaining to merit evaluation and development, scheduling subsequent interviews and typing summaries of related discussions; • Assists with preparation of faculty dossiers and materials for promotion and tenure, maintains current committee membership lists; • Coordinating meetings with the Dean and Director to meet with Promotion and Tenure track faculty and organize all paperwork involved in this process; • Reconciles salary reports; • Prepares all documentation related to Staff Appointment Notice, Faculty Appointment Notice, GRA Appointment Notice, GTA Appointment Notice, Leave/Irregular Work Week Form, Non-Continuing, Non-Employment Remuneration Appointment Notice, Post-Doctoral Fellow Appointment Notice, Termination Notice, Work Study Student Appointment Notice, Academic Administrative Post Appointment Notice; • Distributes deposits slips, pay cheques, T4 slips; • Maintains and develops internal payroll database; • Assists with the faculty recruiting and appointment process; • Investigates all payroll related concerns on behalf of faculty and staff and advocates when necessary; • Advices Faculty of Teaching and Service Workload for the upcoming Academic Year (as per Clause 5.2.1, Workload Article of the Collective Agreement). 	
NO.	OTHER DUTIES (less than 10%)	

1. Maintains confidential personnel files for faculty and staff.
2. Prepares faculty listings for UWO and School Calendars
3. Provides assistance and back-up support to office co-workers during absences and peak periods involving responding to visitors to the office and the general inquiry telephone extension; participating in the administration of teaching evaluations; and other delegated assignments.
4. Assists the Student Affairs Officer with arrangements for special functions and receptions including awards ceremonies and convocation.
5. Assists the Student Affairs Officer and the Admissions Coordinator in the Admissions Weekend for potential dental students.

NO.

OTHER DUTIES (less than 10%)

6. Assists the Assistant Director, Alumni Affairs and Secretary in correspondence with Alumni and Donors (ie. Ontario Dental Association events, Alumni Newsletter and Alumni of Distinction Award).
7. Assists the Chair and Administrative Assistant in the Division of the Qualifying Program with the faculty and staff contracts for the Summer Clinic and the Prior Learning Assessment

- 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**.

- Training and guidance for new employees – for divisional/clinic staff and secretary
- Work distribution and/or verification of results – for bursary student assistants, casual staff
- 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: <input checked="" type="checkbox"/>	X Complete Composition	Letters, memos
	X Partial composition with general direction (verbal or written)	Letters, memos
	X Prescribed format	Letters
Reports: <input checked="" type="checkbox"/>	X Complete composition	Committees
	X Partial composition ...	Minutes, Surveys
	X Prescribed format	
Other: <input checked="" type="checkbox"/>	X Complete composition	Email Listings, Telephone Directories, Surveys, etc.
	X Partial composition ...	
	X Prescribed format	

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

University degree or college diploma, preferably in Commercial & Administrative Studies. A minimum of five years of work experience providing administrative and executive secretarial support for senior managers is required. Preference given to experience in accounting and payroll administration.

Effective interpersonal and oral communication skills with the professionalism and confidence required to represent the Director and Administrative Officer. Excellent judgement and sensitivity to the needs and concerns of constituent groups and an innate customer service orientation. An ability to write clear and concise reports, as well as to compose correspondence on behalf of others. Strong organizational skills and a capacity to anticipate, plan for and be proactive to the needs of the Director and Administrative Officer. An ability to respect and maintain confidential information is imperative. Knowledge of University policies and procedures is also required.

A mathematical aptitude and experience utilizing accounting and payroll systems is required. Familiarity with Excel or other spreadsheet packages and PeopleSoft Financials is necessary and knowledge of the University's accounting system is essential. Attention to detail and accuracy is very important. Excellent computer skills and a high degree of proficiency in word processing, graphics software, database applications and e-mail communications are also necessary.

Must be self-motivated and possess a strong team orientation. A commitment to supporting co-workers and the personal flexibility to adjust priorities to ensure the overall needs of the Office is also required.

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

The Administrative Assistant works under the general supervision of the Administrative Officer, but works independently to plan, prioritize and complete both daily and cyclical activities. The Director may also delegate and supervise the completion of specific projects and assignments.

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

- Responds to requests for appointments with the Director and responds to a wide variety of inquiries pertaining to the programs and activities of the School. Screens and prioritizes incoming mail, re-directing to others when appropriate.
- Responds to student inquiries concerning policies and procedures.
- Researches and compiles information to respond to inquiries and brief the Director.
- Resolve issues related to account status, routine financial transactions.

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

1. Issues regarding academic policies and standings for students.
2. Non-standard problems and inquiries concerning accounting processes.
3. Financial authorizations for account adjustments or appointments.

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

1. Daily planning of assigned work and schedule of appointments for the Director.
2. Preparation of weekly and monthly payroll
3. Organization of faculty review process (annually).
4. Submission of President's Report (annually)
5. Initiates purchase requisitions, journal entries, budget transfers, invoices (daily).
6. Printing and distributing Summary of Accounts from Peoplesoft Financials (monthly).
7. Support person for major projects (monthly/annually)
8. Organization of faculty and staff receptions, workshops and seminars (monthly/annually).
9. Prepares, schedules and coordinates activities pertaining to the recruitment of new faculty (monthly/annually)

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...)
Deans Offices	X		X			meetings, letters, authorizations
Dental Faculties	X		X			faculty/student matters
UWO Depts.		X		X		payroll, appt. notices, reservations
Granting Agencies/Donors		X			X	faculty/student research & awards
Students	X	X	X			provides information, guidance
Faculty	X	X	X			provides and requests information
Staff	X	X	X			provides and requests information
General Public		X	X			provides assistance and re-directs

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

Staff Member: VACANT

Present Classification _____ Signature _____ Date _____

Supervisor: Keith Pearce

Signature [Signature] Date Aug. 30/06

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 *[Signature]*
- Department Head *[Signature]*
- Dean's Office *[Signature]*
- Date SEP 01 2006