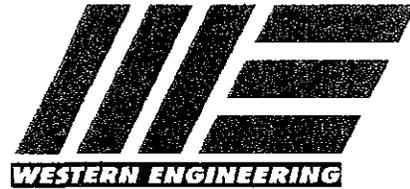




Memorandum  
Office of the Dean



Date: June 10, 2009

To: UWO-UWOSA Job Evaluation Appeals Committee

Re: Logistics Coordinator Position in Engineering Financial Services

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I would like you to reconsider your rating of SG9 for this position based on the following, which will hopefully provide the additional clarity to this enhanced role (was previously Assistant Stores Coordinator):

- **Accountability:**
  - The position assumed the following fully responsible roles from the Stores Coordinator Position (SG11) which was eliminated:
    - Inventory management and reporting
    - Coordination of entire logistics process
    - Increased purchasing responsibility and Visa reconciliation
  - The following roles have been modified to accommodate increased responsibility and signing authority: increased signing authority for purchase transactions to \$25,000 (exceeded even SC position); direct coordination of issues with departments (*please note under point 2 of the "Purchasing and Financial Management section that the words "Engineering Financial Manager" should be removed*); and responsibility for handling of dangerous goods and related training.
- **Change in reporting structure and supervision:** this position previously reported to the Stores Coordinator who in turn reported to the Director, Financial Services but now the LC reports directly to the Director and works independently except for matters which are confidential or highly unusual in nature,
- **Minimum skills and job requirements:** this section has been upgraded accordingly to match the role responsibilities.

With the elimination of the Stores Coordinator role, this revised position has assumed increased levels of responsibility, accountability and autonomy. The Logistics Coordinator is an important role in Financial Services and supports the entire operations of a research intensive Faculty of Engineering (encompassing operating, research and ancillary units).

Please contact me if you have any questions.

Sincerely, 

Remington L Wickman, CMA  
Director, Financial Services  
SEB 14C; (519) 661-2111 ext. 88328  
lwickman@uwo.ca

**UWOSA JOB EVALUATION RECORDING FORM**

**Office Support Plan**

(APPEAL)

**Dept:** Engineering - Financial Services  
**Dept. Num.** 260100  
**Incumbent:** Stephen Mallinson  
**Citte Mem. Present:** UWOSA: K. Foullong, R. Fournier, L. Johnson, M. Parker,  
 ADMIN: J. Asuncion, L. Brock, C. Bumbacco, C. Zrini

**Job Title:** Stores Coordinator

**Eval. Date:** Sep-09

	FACTOR	COMMENTS	SUB FACT	DEGREE	PTS	Profile		
						-	=	+
I	Job Knowledge	College diploma 6 years experience, Supply Services support role.	Educ	4				
			Exper	F	140			
II	Initiative	Plan all associated activities. Takes action without reference to supervisor		5	75			
III	Complexity/Judgement	Vaired. Variety of activities. 1,860 student, faculty staff		4	35			
IV	Contacts	Regular contacts with public, students, faculty		3	45			
V	Errors	Awkward - detected outside unit. Productivity errors		3	45			
VI	Supervision of Others	Incidental	Char.	1				
			Scope	A	5			
VII	Effort/Demands	Moderate		2	30			
VIII	Physical Environment	Minor disadvantage		2	20			

CLASSIFICATION ASSIGNED

Total Pts: **395**

Group: \_\_\_\_\_ Stores Coordinator \_\_\_\_\_

Level: \_\_\_\_\_ Salary Grade 11 \_\_\_\_\_

Co-Chair Signatures: UWOSA: Mike Parker \_\_\_\_\_

ADMIN: Chris Bumbacco \_\_\_\_\_

**POSITION DESCRIPTION  
QUESTIONNAIRE**

**THE UNIVERSITY OF WESTERN ONTARIO  
EMPLOYEE RELATIONS**

<b>ROLE</b>	<b>PRESENT INCUMBENT</b>		<b>POSITION IDENTIFICATION</b>	
	<b>SURNAME</b>	<b>INITIALS</b>	<b>DEPT. NO</b>	<b>P.S. JOB CODE</b>
<u>Logistics Coordinator</u>	<u>MALLINSON</u>	<u>S</u>	<u>260100</u>	<u>SA4X71</u>

**BASIC POSITION INFORMATION**

**DEPT. NAME** FACULTY OF ENGINEERING

**SECTION NAME** FINANCIAL SERVICES

**LOCATION** SEB 14

**WORK WEEK HRS.** 40

**SUPERVISOR SURNAME** WICKMAN **INITIAL** RL **PHONE** 88328

<b>FOR SALARY ADMINISTRATION USE</b>	
CLASS'N _____	
CLASS'D _____	EFFECT _____
Date	Date
ANALYST _____	

- 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	%
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The **Logistics Coordinator** supports the operations of Engineering Financial Services as the key person accountable for the effective and efficient coordination of the receiving/shipping, store inventory management and customer services/sales functions serving Western Engineering. The incumbent reports to the Director, Financial Services (DFS) and works in conjunction with Procurement Specialist in supporting purchasing functions.

The incumbent must have knowledge and experience in materials handling & supply and logistics coordination. In order to perform adequately, the incumbent must be knowledgeable about all facets of the workings of Financial Services, PeopleSoft Financials and UWO policies and procedures, including those related to Health & Safety – lab equipment & materials. The incumbent must have the ability to organize and effectively manage conflicting priorities and deal with confidential and sensitive information. This position requires the incumbent to interact daily with all members of the Faculty – faculty, staff & students, support units at UWO and external suppliers.

The incumbent will be responsible for providing support in the following areas:

**Logistics & Administration:** **40%**

1	<p>Coordination of Receiving and Shipping operations:</p> <ul style="list-style-type: none"> <li>• Responsible for receiving operations for Faculty including:             <ul style="list-style-type: none"> <li>• Establish and maintain controls for the effective and efficient flow of goods into &amp; out of Stores, including:                 <ul style="list-style-type: none"> <li>○ Establishing processes for the receipt of goods inclusive of the development and use of receiving logs, checking packing slips and verifying to purchase orders and signing for goods</li> <li>○ Ensure certification of equipment requiring CSA or equivalent approval and arrange certification of non-compliant equipment prior to release to Customer.</li> <li>○ Signing for shipments from couriers and assisting with unloading of vehicles</li> <li>○ Record condition of goods received and liaises with purchaser &amp; supplier regarding back-orders and returns or exchanges.</li> <li>○ Contact purchasers and coordinate internal deliveries with departments and other Engineering units located in various locations including Boundary Layer Wind Tunnel, University Machine Services (UMS) and Engineering units at other UWO facilities.</li> <li>○ Liaise with Central Finance as necessary and with PPD on coordination of on-campus deliveries and shipping depots.</li> </ul> </li> </ul> </li> </ul>
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	<ul style="list-style-type: none"> <li>Responsible for shipping coordination for Faculty including arranging courier pick-ups and recommending most effective method of delivery (i.e., preferred courier &amp; air vs. ground)</li> </ul>
2	<b>Inventory Management:</b> <ul style="list-style-type: none"> <li>Responsible for monitoring Stores inventory via utilization of database tools (stocking limits); develop controls and processes for the periodic review of inventory levels and perform selective counts.</li> <li>Establish adequate stocking levels, initiate purchasing for restocking and make recommendations to DFS for significant inventory changes, such as new product lines and writing off obsolete/unused/old stock.</li> <li>Coordinate Inventory of Electrical Parts &amp; Lab Kits with Electronics Shop</li> <li>Responsible for posting material receipts &amp; updates to Inventory Management Database System and restock inventory on shelves.</li> <li>Liaise with Department Technicians and Researchers on inventory requirements for labs.</li> <li>Inventory Management Database: Manage the processing, tracking and reconciliation of transactions, including the upload to PeopleSoft.</li> </ul>
3	Use PeopleSoft Financials on a daily basis and attend formal training sessions.

### Customer Service & Sales:

30%

1	<b>Customer Service &amp; Sales Assistance:</b> <ul style="list-style-type: none"> <li>Incumbent is the first line of contact with customers and is responsible for providing assistance as necessary, including: <ul style="list-style-type: none"> <li>Providing advise on materials needs and sourcing from suppliers if required</li> <li>Retrieving items from inventory and processing the sales transaction by allocating costs to accounts or collecting funds and updating sales log or providing a sales receipt to record transaction</li> <li>Customizing inventoried materials, including repackaging, decanting &amp; labeling and cutting of metals, piping, plastics and other materials</li> <li>Compressed Gas Orders: Record tank # from customer and allocate to account</li> <li>Tools Borrowing: Record transaction in log and follow-up with customer on unreturned items</li> </ul> </li> <li>Liaise with vendors on behalf of customers on matters such as purchasing, delivery, invoicing and payments</li> </ul>
2	<b>Sales Administration:</b> <ul style="list-style-type: none"> <li>Responsible for the development of processes and procedures utilized in the managing the sales function</li> <li>Participate in planning for Unit to improve customer services, including the automation of ordering and payment processes</li> <li>Participate in training sessions on customer service and cash management</li> </ul>

### Purchasing & Financial Administration:

20%

1	<b>Purchasing Administration:</b> <ul style="list-style-type: none"> <li>Approve all purchase requisitions up to \$25,000 per transaction for all programs and projects</li> <li>Initiate purchases in accordance with UWO Purchasing policies and procedures for replenishment of inventoried stock and for customer orders</li> <li>Liaise with Central Purchasing Department as required on out-of-country purchases, ensuring necessary documentation is provided to meet Canada Border Services Agency (CBSA) regulations &amp; approvals</li> <li>Liaise with Central Finance and vendors on invoicing, payments and purchases made as required.</li> <li>Management of Student Print Credit service, ensuring updates to accounts, receipt of cash, tracking of transactions on log, prompt deposits of funds and coordination of refund process.</li> <li>Monthly reconciliation of Visa Purchasing Card transactions processed each month.</li> </ul>
2	<b>Financial Processes Administration:</b> <ul style="list-style-type: none"> <li>Support the cash management function of stores unit by ensuring transactions are recorded and cash collected and safeguarded until deposited</li> <li>Work with Engineering Financial Manager and I.T. Services in the coordination of the Student Print Credit service, regarding account updates, cash transactions and refund processes. Provide analysis of</li> </ul>

	performance history and statistical information <ul style="list-style-type: none"> <li>• Work with DFS in Year-End Accounting processes for effective Inventory Management System</li> </ul>
3	Liaise with Central Finance Department, Purchasing, suppliers and PPD as judged necessary.
4	Database Management: <ul style="list-style-type: none"> <li>• Responsible for the maintenance of information for Engineering Inventory Management Database</li> <li>• Assist in the development of database design and report preparation</li> </ul>
5	Use PeopleSoft Financials on a daily basis and attend formal training sessions.

NO.

**OTHER DUTIES (less than 10%)**

1	As required, provide assistance and cover functions of Procurement Specialist in their absence.
2	Serves as a member of Faculty Health & Safety Team due to materials handling knowledge.
3	Coordinate various other shop services and functions, including A/V equipment, tools borrowing, laundry, garbage pick-up, stock housekeeping, Stores mail
4	Actively contribute to Financial Services Team internal planning and process reviews in support/establishment of service goals and participate in monthly meetings
5	Attend all Western Engineering staff meetings and participate as an active member of the Western Engineering team.

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
<b>Correspondence</b>		
Partial Completion with general direction (verbal or written)		
<ul style="list-style-type: none"> <li>• General correspondence from Faculty, Staff and Students</li> <li>• Letters to vendors/customers</li> </ul>		
<b>Reports</b>		
Complete Composition		
<ul style="list-style-type: none"> <li>• Receiving Reports</li> <li>• Customs Declarations</li> </ul>		
<b>Other</b>		
Complete Composition / prescribed format		
<ul style="list-style-type: none"> <li>• Purchase Requisitions</li> <li>• Petty Cash Forms &amp; Cash Receipts</li> <li>• Courier Forms</li> </ul>		

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

- The incumbent must have a postsecondary diploma from a Community College or equivalent; PMAC certificate in Purchasing would be a strong asset.
- At least 6 years experience in a stores or supply service support role combined with knowledge of materials/supply handling and logistics is required.
- Purchasing experience in an industrial and/or supplies environment is required.
- Complete understanding of inventory management principles is required.
- Strong knowledge and experience using Microsoft Word, Excel, Outlook, Database and PeopleSoft experience strongly preferred.
- Familiarity with UWO Policies and Procedures relating to finance and purchasing.
- Experience dealing with cash management, ensuring discrete handling and security of funds.
- Experience with shop equipment and tools are expected as well as, occasional heavy lifting.
- Must be able to deal calmly in difficult situation with difficult people.
- Must be able to pay attention to detail; accuracy in this role is critical.
- Must demonstrate ability to work effectively in a team environment; a successful track record in a team environment is required; ability to plan own work sequences.
- Proven ability to communicate effectively and professionally at all levels is essential.
- Good, professional attitude in the workplace, willingness to learn new procedures, software, etc.
- Excellent time management skills are required: proven organizational skills to anticipate, plan and balance multiple priorities with many interruptions; able to meet and cope with the stress of deadlines & maintain accuracy.
- Willingness to learn and to be a co-operative member of the Western Engineering staff team.

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

- Works independently with minimal supervision and consults with the Director, Financial Services on highly complex or unusual financial or operational issues
- The incumbent is expected to proceed with day-to-day work independently and to use sound judgment in referring matters to other appropriate sources

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

- Responds to inquiries from faculty, students and staff (petty cash, print credits, customs clearance and purchasing issues) and external vendors/agents (customs clearance, purchasing and payment requests).
- Uses judgment to distinguish policy interpretation and information, responding to requests that can be handled and redirecting those that should be referred elsewhere (Store Coordinator, Central Purchasing & Finance Departments, and Engineering Departments).

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

- Consults with Director, Financial Services on problems of a non-routine, complex or highly confidential or sensitive nature
- Requests for items which are handled by specific departments/offices are forwarded to them, such as:
  - PeopleSoft problems – PeopleSoft Resource Group; ITS Help Desk

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

- Organize Year-end close and reconciliation of Inventory Management System, including stock adjustments and write-downs
- Monthly retrieval and distribution of account statements from Inventory Management System
- Annual coordination of purchase standing order process for Stores Unit
- Day to day organization of own work schedule to best accommodate requests, ensuring customer needs

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 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		FREQUENCY (dly wkly mthly)	PURPOSE OF THE COMMUNICATION (e.g. to provide information concerning...)
	(inside dept	outside) dept		
Faculty, Staff	X		X	Petty Cash, Materials Handling, Purchasing & Shipping/Receiving, CSA
Students	X		X	Print Credits, Purchases
Purchasing, Finance		X	X	Customs Declarations for Shipments, Function & Document processing

**Position & Financial Scope (2009):**

- Signing Authorization:
  - Purchasing Encumbrances: \$25,000 per transaction for all Engineering Programs/Projects
  - Purchasing Card: \$30,000/mth; \$5,000/transaction
  - Cheque Requests \$ 5,000 per form
  
- Number of users/clients served in various capacities by incumbent:
  - Faculty Members 100
  - Staff, incl. Research Centres 100
  - Graduate Students 500
  - Research Staff – Contract 40
  - Undergraduate Students 1,100
  - Student Project Groups 20
  
- Estimated Annual Purchases \$ 5,500,000
- Estimated Travel Expenditures \$ 600,000
- # Programs / Projects Serviced 450

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

*Staff Member: Stephen Mallinson*

Present Classification Assistant Stores Coordinator Signature \_\_\_\_\_ Date \_\_\_\_\_

*Supervisor: Remington Lonnie Wickman, Director Financial Services*

Signature \_\_\_\_\_ Date \_\_\_\_\_

**UWOSA JOB EVALUATION RECORDING FORM**

**Office Support Plan  
(APPEAL)**

Dept: ENGINEERING  
 Dept. Num. \_\_\_\_\_  
 Incumbent: S. MALLINSON  
 Cite Mem. Present: UWOSA: K. Foullong, R. Fournier, J. Milléte, M. Parker,  
 ADMIN: J. Asuncion, L. Brock, C. Bumbacco, C. Zrini

Job Title: ASS'T STORES

Eval. Date: SEPT 23/09

I	FACTOR	COMMENTS	SUB FACT	DEGREE	PTS	Profile		
						-	=	+
	Job Knowledge	COLLEGE DIPLOMA. 6 YEAR EXP. SUPPLY SVCS SUPPORT ROLL.	Educ 4 Exper. F		140			
II	Initiative	PLAN ALL ASSOCIATED ACTIVITIES TAKES ACTION WITHOUT REFERENCE TO SUPERVISOR	5		75			
III	Complexity/Judgement	VARIED. VARIETY OF ACTIVITIES.  1,800 STUDENT, FACULTY, STAFF	4		35			
IV	Contacts	REGULAR CONTACTS WITH PUBLIC, STUDENTS, FACULTY.	3		45			
V	Errors	AWKWARD. - DETECTED OUTSIDE UNIT. PRODUCTIVITY ERRORS'	3		45			
VI	Supervision of Others	INCIDENTAL	Char. 1 Scope A		5			
VII	Effort/Demands	MODERATE.	2		30			
VIII	Physical Environment	MINOR DISADVANTAGE	2		20			

CLASSIFICATION ASSIGNED

Total Pts: 0

Group: STORES CO-ORDINATOR

395

Level: SG.11

Co-Chair Signatures: UWOSA: [Signature]

ADMIN: [Signature]