

O. ...

**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: Wendy Bridgman
Title: Secretary III
Phone: 82051
Email: bridgman@uwo.ca
Department: BACS

(B) Position Information:

Current Incumbent: Wendy Bridgman
Current Classification: Secretary III
Classification Being Appealed: Secretary III
Date Evaluation Results Letter Received: Monday February 16, 2004

(C) Information Required For Job Evaluation Appeals Committee:

Reason for the appeal: The Bachelor of Administrative and Commercial Studies Program represents the single largest enrollment unit within the Faculty of Social Science (Approximately 2000 students in a variety of programs). The current faculty complement is 27 (both full- and part-time), and the administrative office consists of the Program Director, three full-time staff members and one half-time staff member. Within this structure, I provide administrative support to the Program Director (50%) including the preparation of reports, distribution of correspondence, maintaining program and faculty files, and support for the various committees within BACS. I am responsible for textbook orders, and all aspects of examination administration including the timely submission of examinations to the registrar's office and the actual electronic entry of course grades for those faculty not familiar with the Marks Management System. Thus, the vast majority of my job consists of administrative duties, which I believe will qualify for a job classification beyond that of a Secretary III. For comparison purposes, please note the attached position posting (S482). This position requires the same educational qualifications and the same experience as my current position. The required skill sets are similar. Despite the fact that the administrative load for position S482 would appear lighter than mine, this position is classified as S.G. 10. Thank you.

Supporting Information (Optional):

(Attach an additional page if more space is required)

(D) Approvals:

Signature of Person Appealing: Wendy Bridgman Date: Feb. 25, 2004

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

**STAFF POSITION
Continuing**

Reference #: S482

Position Title/Classification: Administrative Secretary (S.G. 10)

Department: Physics and Astronomy

Salary Range Minimum: \$31,958 (35 hrs/wk)

Type of Appointment: Continuing

Position Summary:

The incumbent will provide secretarial services to the Chair including dealing with electronic and regular mail; responding to phone calls; preparing and distributing correspondence, reports, minutes, and course material; arranging meetings; and maintaining files for faculty members. You will provide accurate and timely support to various Faculty Association committees which deal with faculty appointments, promotion and tenure, performance evaluation, and workload.

Minimum Qualifications:

Formal Education:

Post Secondary education in administration, business and/or secretarial studies is preferred.

Experience:

Several years of senior secretarial experience is required.

Skills:

- Strong written and oral communication skills with good spelling/grammar.
- Ability to work independently.
- Ability to use discretion when dealing with strict confidential matters.
- Good understanding and familiarity with University administrative structure and the role of the department within it.
- Excellent keyboarding and word processing skills.

Closes: February 18, 2004

Contact: Mike Lathem, Human Resources Consultant



Office of the Dean • Faculty of Social Science

3 March 2004

Ms. Donna Chute-Dolan
Salary Administration
Stevenson-Lawson Building

Dear Ms. Chute-Dolan:

I have consulted with Keith Fleming, the Director of the BACS Program, and would like to elaborate on the information provided in the job description of Wendy Bridgman, which I understand is under appeal.

This position is similar in breadth and scope to the Sec III position held by the incumbent while in another department. It might be helpful to note that new duties have not been added to this position in BACS since the last evaluation, and indeed, some of the financial responsibilities have been eliminated.

The job description indicates that 50% of the time is 'Support to Program Director'. Please note that there is also a Sec IV position which devotes 40% of the time to 'Support to Program Director'. The majority of the administrative support provided by the incumbent is word processing. This includes reports and correspondence. The incumbent makes appointments for the Director, but does not make any of his travel arrangements.

The BACS is an interdisciplinary undergraduate program. There are currently some 25 courses offered by the Program itself, while all other compulsory courses are offered by other departments. There is no graduate program. There are a large number of students, however it is important to note that the most complex student advising within the Program is done by the Program Director. More straightforward advising is handled by the Program Advisor (S.G. 10). There is also a Sec IV position with about half-time devoted to assisting the Advisor. The incumbent is responsible for answering general questions of a factual nature.

The Committees in BACS are generally chaired by the Director. The incumbent does not attend the meetings for all of these Committees. In particular, it is worth noting that the Dean of the Faculty chairs all the Promotion and Tenure Committees in Social Science, and his Administrative Officer is responsible for contacting the external referees and attending the meetings to ensure consistent procedures and recording of minutes. The incumbent's role in the Promotion and Tenure Committee is assisting the Faculty member with the typing various documents, collating information and arranging meetings/rooms. It might be worth noting here that the Program currently has 1 tenured Associate Professor with a joint appointment in History, 1 probationary appointment with a joint appointment in another Social Science department and 1 full-time probationary appointment. In the case of the joint appointments, the BACS Program is not the home department. Although there may be hopes of other probationary appointments in the future, all the other current appointments are Limited Term or Limited Duties.

The incumbent does keep a binder of minutes for a number of other Committees as requested by the Director.

Please note also that the faculty recruitment ads are in a prescribed UWO format based on information provided by the Director and the Office of the Dean.

The supervisory duties of the incumbent relates only to part-time staff. In the BACS Program this refers to occasional temporary assistance during the add/drop period and proctors. Knowledge of '... the procedures involved with the administration of salaries' would be restricted to general background information, as the Sec IV position handles the payroll issues for the unit.

Yours sincerely,

Linda Brock
Administrative Officer
Office of the Dean
Faculty of Social Science

:lb

UWOSA JOB EVALUATION RECORDING FORM

Office Support Plan

(APPEAL)

Dept: Bachelor of Administrative Studies
Dept. Num.
Incumbent: Wendy Bridgman
Citite Mem.Present: UWOSA: M. Broadfoot, J. Sparks, D. Shepherd
 ADMIN: P. Grant, V. Smith, C. Zrini

Job Title: Secretary

Eval. Date: March 24, 2004

I	FACTOR	COMMENTS	SUB FACT	DEGREE	PTS	Profile		
						-	=	+
I	Job Knowledge	College Diploma. Transportable skills - learning about one year	Educ	3				
			Exper.		E	85		
II	Initiative	Generally regulated. Established procedures						
III	Complexity/Judgment	Standardized because decisions/judgment follow practice		3	35			
				3	25			
IV	Contacts	Majority outside unit						
V	Errors	Awkward, embarrassing, visible outside unit, eg. Exams, grades		3	45			
				3	45			
VI	Supervision of Others	N/A	Char.	1				
			Scope		Ant	5		
VII	Effort/Demands	Moderate, constant interruptions, variety of tasks associated with deadlines						
VIII	Physical Environment	Normal office environment		2	30			
				1	10			

CLASSIFICATION ASSIGNED

Total Pts: 280

Group: Secretary

Level: 4

Co-Chair Signatures: M. Broadfoot

C. Zrini

509

Appeal
FEB 16, 2004

Slotting SHEET

POSITION DESCRIPTION THE UNIVERSITY OF WESTERN ONTARIO
QUESTIONNAIRE **COMPENSATION DEPARTMENT**

INDICATES
SEC IV
PRESENT INCUMBENT

SOCIAL INSURANCE NO.

SURNAME
Bridgman

INITIALS
W

POSITION IDENTIFICATION

DEPT. NO POS'N NO
220700

BASIC POSITION INFORMATION

DEPT. NAME Bachelor of Administrative and Commercial Studies Program

SECTION NAME: _____

LOCATION: Social Science Centre

WORK WEEK HRS. 35

Atkinson

L

Ext 84943

SUPERVISOR SURNAME: _____

INITIAL _____

PHONE _____

FOR SALARY ADMINISTRATION USE	
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	%
-----	--------------	---

The Bachelor of Administrative and Commercial Studies (BACS) Program Office services 2000+ students and provides the administrative function to the Program Director, faculty members, and BACS Program Advisor. There is minimal opportunity for training, and the incumbent in this position is expected to be resourceful, and capable in the acquisition of new knowledge. The incumbent reports directly to both the Program Director and the Program Advisor, and is expected to work independently with minimal supervision. All staff within the BACS Program Office work together as a team, and each staff member is expected to collaborate with all other staff members as necessary.

The incumbent is responsible for workload from:

- the Program Director regarding undergraduate academic program and administrative matters
- the Program Advisor regarding academic counselling and administrative matters

It is expected that all staff carry out their duties in the Program Office at all times respecting the confidential and personal nature of the information processed.

MAJOR DUTIES

Support to Program Director (50%)

- Provides administrative support to Program Director and is delegated by Director to prepare reports and correspondence, and to manage Director's schedule
- Provides administrative support to all BACS Program committees: (Appointments, Promotion and Tenure; Annual Performance Evaluation; Steering; and Workload). Schedules meetings, books rooms, and provides administrative support to committees; in addition, issues the agenda under the direction of the Program Director or designate, takes the minutes, and is solely responsible for maintaining an accurate record of meetings with approved minutes, agendas, handouts, etc.
- Acts on own initiative to determine and provide assistance to Program Director in non-routine matters that arise, keeping Program Advisor aware of ongoing activities
- Responsible for the preparation, accuracy and posting of all faculty recruitment ads
- Assists with Program Director and Program Advisor in preparation of reports, statistics, and information gathering
- Other duties as assigned by the Program Director

Salary Administration and Human Resources (10%)

- Maintains all confidential staff and faculty files (salary and human resource matters)
Maintains records of vacation leaves, sick leaves and reconciles any discrepancies

Program Duties (35%)

Provides administrative assistance to all BACS faculty with specific responsibility for:

- Updating confidential Curriculum Vitae annually; assisting faculty in the preparation of their Annual Reports
 - Coordinating the ordering of textbooks for all BACS undergraduate courses, and desk copies from publishers; liaison with the UWO Book Store
 - Coordinating and managing all aspects of examination administration including: liaise with the Registrar's Office; reserves rooms; ensures that all exams are submitted by appropriate deadlines; assists faculty with typing of exams; liaison with the Services for Students with Disabilities - obtains exam, arranges pick up/drop off and signs for return
 - Responsible for collecting and posting of all final grades; retrieves class lists from PeopleSoft; enters grades for faculty members who do not have access to Marks Management System; instructs and advises faculty on MMS applications and updates; submits and maintains all electronic grade files
 - Attends to students, faculty, and visitors in a professional manner regarding courses and program on a daily basis, directing specific program inquiries and messages to the appropriate staff or faculty member
 - Coordinates the preparation of all course outlines
 - Handles routine counselling inquiries during exceptionally busy times on a daily basis, including clarification of Senate regulations, policies and procedures. Where appropriate, incumbent books appointments with Program Advisor for students requiring additional program related assistance
- Assists Program Advisor with organization and administration of program related student registration activities (e.g. during Add/Drop periods, Program Counselling, etc.); exercises signing authority for adding and dropping students from courses offered by the BACS program

NO.	OTHER DUTIES (less than 5%)
-----	-----------------------------

- Western Directory Coordinator for the BACS faculty/staff phone listing
- Maintains and updates listings for: Commonwealth Universities Yearbook; UWO Academic Calendar; and five public mailing lists online
- Arranges for and distributes keys for faculty/staff
- Updates the BACS website using Microsoft Frontpage
- Coordinates booking of seminar rooms, and liaises with the Reservations Department to book rooms for lectures, colloquia, exams/tests, meetings, etc.

2)	PLEASE COMPLETE THE FOLLOWING TABLE CONCERNING STAFF MEMBERS WHO REPORT DIRECTLY AND FORMALLY TO YOU.
----	---

Not Applicable

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

- Training and guidance for new employees (part-time staff)
- Work distribution and/or verification of results (part-time 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
<input checked="" type="checkbox"/> Correspondence	<input checked="" type="checkbox"/> Complete composition	memos, letters, e-mails, etc.
	<input type="checkbox"/> Partial composition with general direction (verbal or written)	
	<input type="checkbox"/> Prescribed format	
<input checked="" type="checkbox"/> Reports	<input type="checkbox"/> Complete composition	
	<input checked="" type="checkbox"/> Partial composition	Annual Report; Publications
	<input type="checkbox"/> Prescribed format	
<input checked="" type="checkbox"/> Other:	<input checked="" type="checkbox"/> Complete composition	as required
	<input type="checkbox"/> Partial composition	
	<input 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?
----	--

- competent with PeopleSoft: Higher Education, Human Resources, and Financial systems
- competent with procedures with administration of salaries
- excellent organizational and problem-solving skills

- strong written and oral communication skills
- good time management and interpersonal skills
- excellent computer skills (i.e. Windows, WordPerfect, Word, Excel, Marks Management System, Microsoft Frontpage)
- Community college degree in related area with at least 5 years experience in an administrative position
- ability to work effectively under pressure with frequent interruptions
- ability to exercise initiative, be diplomatic and maintain confidentiality of sensitive information
- familiar with UWO policies and procedures, especially with respect to academic requirements and policies

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

The incumbent works virtually independently. Matters within the scope of the job not requiring the Program Chair or Program Advisor's personal attention are handled on the incumbent's own initiative, utilizing sound judgement and effective problem solving skills.

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

Inquiries regarding course scheduling, examination conflicts, deadlines, room reservations, and minor program requirements in the first instance.

- concerns of faculty and students re office routing, teaching facilities, etc.
- prioritizing of workload
- ensuring that task deadlines are met
- conflicts of meeting schedules
- student enquiries regarding program information within the scope of authority

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

Any unusual matters/concerns beyond the incumbent's scope of authority
 Decisions regarding program counselling are directed to the Program Advisor

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

- meetings of committees (as required)
- travel and reception arrangements (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	LOCATION	FREQUENCY	PURPOSE
Program Director	inside	daily	provide administrative support
Faculty	inside	daily	course material, textbook orders, committee work
Students	inside / outside	daily	program-related questions within scope of authority
Social Science Deans' Office	outside	as required	website; room reservations
Registrar's and Student Records	outside	as required	examination scheduling, course timetabling, classroom allocation, grades
Reservations	outside	as required	room reservations for courses, midterm exams, tests, meetings
Physical Plant	outside	as required	heating/cooling problems and safety concerns, caretaking requests, key requisitions, locksmith
Telecommunications	outside	as required	ordering phones, reset messages, phone directory
Food Services	outside	as required	arranges catering for meetings, receptions
Stationary Stores	outside	as required	office supplies
Other Departments on campus	outside	as required	interdepartmental concerns
Universal Printing	outside	as required	letterhead, envelopes, business cards
Weldon Library	outside	as required	Faculty and Staff Publications

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

Staff Member:

Secretary III

Present Classification

Wendy Bridgman

Signature

Oct 15/03

Date

Supervisor:

[Signature]

Signature

Oct 15/03

Date

[Signature]

Subject: Additional notes for March 24th JEAC meeting

Date: Tue, 23 Mar 2004 16:15:43 -0500

From: Donna Chute-Dolan <perdec@uwo.ca>

Organization: University of Western Ontario

To: bumbacco <bumbacco@housing.uwo.ca>, Connie Zrini <connie.zrini@fmd.uwo.ca>, Corinne Bender <bender@stats.uwo.ca>, David Shepherd <shepherd@housing.uwo.ca>, jsparks <jsparks@uwo.ca>, mbroadfo <mbroadfo@uwo.ca>, Patricia Grant <pagrant@uwo.ca>, "Valerie.Smith" <vsmith2@uwo.ca>

The following question was sent to me earlier this afternoon and subsequently forwarded on to the Faculty of Social Science Dean's Office for clarification. The response from the Dean's Office follows the question:

Donna, could you please ask for clarification around the issue minutes for meetings. The PDQ indicates the incumbent is responsible to take the

minutes and the record keeping of such for a variety of committees. However I find it difficult for the incumbent to be responsible for minute taking if they do not attend the meetings as indicated in the accompanying letter from the A.O

Are the minutes taken by another staff member and then passed onto the incumbent for word processing ?

Reply:

To clarify: The incumbent attends and takes minutes for the Steering Committee. When requested by the Director, the incumbent may attend and take minutes for the Annual Performance Evaluation Committee (this role was not required during this current cycle) and Workload Committee. There may be occasion when she would attend the Appointments

Committee meetings. She does not attend Promotion and Tenure meetings. The administrative support she provides to this committee is outlined in

my letter. Although some of us who worked under the Conditions of Appointment frequently refer to the Appointments, Promotion and Tenure Committee (APT Committee), they are actually two committees with different mandates.

Linda Brock
Dean's Office, Social Science