

Re: P.S. Perquin Position Classification (Technical Level 5, Lab Technician 2)

I am appealing the UWO Human Resources evaluation of my position as I am not satisfied with its outcome. I ask that comparisons between the original job description of Sept. 11, 2001 (copy enclosed) and the current job description of Oct. 17, 2005 (copy enclosed) be re-evaluated.

I wish to highlight several areas in which the job content and responsibilities have grown significantly over the past four years. A covering letter from the Departmental Chair also highlights the changes within the Department that have necessitated a change in responsibilities this position has undergone.

Within the Major Duties of the position, I draw your attention to two significant changes. The position is now fundamentally 50% related to Technical Duties and 50% related to Administrative Duties.

Within the Technical Duties I draw your attention to these areas of growth. I now...

- have the responsibility to *assess* the feasibility of new and/or existing lab experiments with respect to the course curriculum whereas in the previous PDQ I *collected and assembled* data for the course instructor's decision making,
- am **training** teaching assistants (TA's) and undergraduate students in the safe handling of laboratory equipment,
- **disperse lab assignments** along with the subsequent record keeping of completed reports handed in for evaluation, for final determination of course grades
- in addition to maintaining software programs used within the labs, **also** maintain *a network of computers* (6 desktop units and 5 laptops),
- have the **budgetary and financial responsibility** for the operation of the 2nd year labs (\$4000 annually),

and

- have a change in the nature and frequency of my supervision from being '*daily*' to '*working independently*'.

Within the Administrative Duties I draw your attention to these changes and additions that have caused the job to grow.

- The operation of the Physics and Astronomy Stores has been classified as 'more so' administrative rather than being grouped within my technical responsibilities as the scope of the position has changed from *maintaining* a "Stores" operation to actually *managing* the Stores operation. The scope of this work now includes my...
 - having the **responsibility to verify all charges** made against the Inventory Account as they appear in the General Ledger, initiating necessary documentation, seeking clarification of entries as necessary, and initiating actions to correct errors and/or omissions,
 - having the **responsibility to create Journal Entries** to charge end-users for purchases made from the Stores Inventory,

- being **responsible for the monthly reconciling** of Corporate VISA purchases for purposes of retail federal and provincial tax audits (for purchases made against my VISA Card),
- having the **responsibility to decide on the actual inventory items to be stocked**, along with the appropriate stocking levels for the same (approximately 2800 line items with an overall inventory value of approximately \$75,000),

and

- having the **budgetary and financial responsibility** for the operation of the P&A Stores (\$3000 annually).
- With growth in the Department (as outlined in the covering letter from the Chair), I have found the job has grown to take on other responsibilities that were not part of my original PDQ. I draw your attention to these areas within the current PDQ...
 - the **initiation of** internal within UWO and external to suppliers/vendors, **queries and quotations for orders** of goods and services
 - the **generation of electronic requisitions** through 'Peoplesoft Financials' for orders, **with a pre-approval of \$10,000 per order**. This is a significant increase from my original PDQ in which it states: having to refer *"To another source for solution ... Purchase of large items of equipment (equipment costing more than \$1000)"*

This is for two separate organizational operations (the Department of Physics and Astronomy **and** the Ontario Photonics Consortium's NanoFabrication Facility/Laboratory).

While not spelled out as such within the new PDQ, one must appreciate the significant organizational aspects and attention to detail that underlie the successful completion of these responsibilities as outlined in the revised Administrative Duties.

Dealing with and effecting proper resolution regarding:

- enquiries to and from Customs and Traffic, seeking clarification on items being shipped and/or received,
- enquires to and from Accounting regarding anomalies highlighted in the monthly reconciliation of accounts,
- enquiries within the department for guidance in preparing documentation for exporting items,
- enquiries from requisitioners, suppliers, purchasing and accounting regarding orders

are to name but only a few of the aspects associated with a **new** daily routine that was **not** part of the original Position Description Questionnaire.

Please feel free to contact me if you have any other questions or require further clarification.

Sincerely,
Phin Perquin

UWOSA JOB EVALUATION RECORDING FORM
TECHNICAL EVALUATION PLAN
 (APPEAL)

Dept: Physics and Astronomy
Dept. Num.
Incumbent: Phin Perquin
Cittee Mem.Present: UWOSA: M. Broadfoot, L. Munn, M. Parker
 ADMIN: C. Bumbacco, V. Smith, C. Zrini

Job Title: Technical Level
Eval. Date: 2006/02/07

	FACTOR	COMMENTS	SUB FACT	DEGREE	PTS	Profile		
						-	=	+
I	Job Knowledge	3 year college diploma. Specific technological discipline	Educ	6				
			Exper.	4	165			
II	Initiative	Independedn work influenced by faculty and standards practices		4	90			
III	Complexity/Judgement	Opportunity to asses and make recommendations, diversity of balance between tech and admin		5	83			
				3	83			
IV	Impact on Results	Embarassment for department if experiments are not set up	Scope	1				
			Char.	A	15			
V	Supervision of Others	No direct supervision of others						
VI	Effort/Demands	Weak. Need for manual dexterity and attention to detail for reparir of electronics		3	28			
VII	Contacts	Lab responsibility re training of students and Tas, relationship to suppliers and business reps		3	30			

CLASSIFICATION ASSIGNED

Total Pts: 494

Group: Technical Level

Level: 6 EVAL.DATE: 00 00 2000

Co-Chair Signatures: UWOSA: M. Broadfoot

ADMIN: V. Smith

**POSITION DESCRIPTION
QUESTIONNAIRE**

**THE UNIVERSITY OF WESTERN ONTARIO
COMPENSATION DEPARTMENT**

SOCIAL INSURANCE NO.

PRESENT INCUMBENT

POSITION IDENTIFICATION

445-415-292

SURNAME

INITIALS

DEPT. NO

POS'N NO

Perquin

P.S.

230800

SO12

BASIC POSITION INFORMATION

DEPT. NAME Physics & Astronomy

SECTION NAME 2nd Year Lab/P&A Store

LOCATION Physics & Astronomy Bldg

WORK WEEK HRS. 40

FOR SALARY ADMINISTRATION USE

CLASS'N _____

CLASS'D _____ EFFECT _____
Date Date

ANALYST _____

SUPERVISOR: Peter Frank - Technical

PHONE 86442

SUPERVISOR: Jackie McLean - Administrative

82190

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 %

1. Performance of Department Technical Duties/Assignments which pertain to the shaping of departmental objectives and decisions with respect to the undergraduate teaching labs in the Physics & Astronomy Department. This relates to the preparation, planning, development and improvement of such; the major emphasis being on 2nd year and then 1st year related courses. **50**

- a) Planning for the execution of laboratory experiments and exercises supportive of undergraduate course instructors needs, along with the necessary routine maintenance and repair of such. This includes the organizing and carrying out of the day to day setting up of experimental apparatus required for the operation of the undergraduate teaching labs.
- b) Assess feasibility of new and/or existing lab experiments in respect to the course curriculum. This includes development or procurement of new apparatus, establishing new practices and processes, implementing technological improvements etc. Design and construct new experiments not available commercially. Provide technical support to the undergraduate course instructors, teaching assistants and students in the matters of day to day functions of the undergraduate laboratory facilities.
- c) Provide technical support and assistance in the operation of lab apparatus, electronics test equipment and the fabrication of prototype student projects (AM radio and amplifier kits, etc) related to the 2nd year undergraduate program. Maintain the use of a network of computers and related software (spreadsheet, word processing, statistical, graphing and electronics design software packages) for student use within the 2nd year labs.

2. Performance of Department Administrative Duties as it relates to: **50**

- a) Operation of the Physics & Astronomy Store (P&A Store). To include daily; ordering, receiving, selling, monthly; billings, reconciliation of accounts and Visa purchases from the general ledger and annually; the organization and verification of Stores inventory.

Through this operation, keeping within the guidelines of Corporate and external agency administrative policies and procedures, approve and initiate documentation of all Department expenditures (to include the new Nanfabrication Facility), valued between \$0.00 - \$10,000.00. Responsible for determining the best method(s) for the acquisition of these goods and services.

Budgetary/Financial Responsibilities:

- 2nd Year Laboratory: \$4,000.00/annual (includes purchasing of expendable supplies, repair or replacement of defective equipment or components, software upgrades)
- P&A Store: \$3000.00/annual (includes purchasing of expendable supplies, software upgrades, improvements to inventory dispensing and control of stock)
- P&A Store Inventory: Control monthly purchasing (~\$7K) and monthly sales (~\$8K) of inventory. Inventory consists of 2800 different line items with a shelf value of \$75,000.00. The electronic components, plumbing fittings, UHV and roughing pump vacuum fittings, tools, etc are pertinent and required for the immediate and on going success of research experiments. As well, internal Shops whose mandate it is to manufacture and/or repair parts and equipment utilized in these experiments, depend heavily on this Just In Time inventory.

NO. OTHER DUTIES (less than 10%)

Technical

- prepare proposals for new and replacement equipment including requests for funds from various funding sources for the equipment required by the 2nd year lab.

Administrative

- issue, maintain and reconcile Departmental petty cash account, valued at \$600.00.

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)	

2nd Year Lab

Undergraduate Students Training in the safe handling of lab equipment including lasers, radioactive media, electronics components. Training in the safe handling of individual lab related apparatus. Collecting and recording and reporting of weekly laboratory assignments and weekly attendance. Answering questions and assisting in the operation and completing of lab sessions.

Teaching Assistants

Training in the safe handling of lab equipment including lasers, radioactive media, electronics components. Training in the safe handling of individual lab related apparatus. Dispersing lab assignments to TA's and collecting and recording of marked assignments into database. Answering questions and assisting TA's in the operation of equipment and completion of lab sessions.

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

- Training and guidance for students
- 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
Corres- pondence	<u> X </u> Complete Composition	Funding proposals, workshop material, technical reference manuals, construction of new lab equipment, experiments
	<u> </u> Partial composition with general direction (verbal or written)	
	<u> </u> Prescribed format	
Reports	<u> X </u> Complete composition	Lab manuals, sales inventory & petty cash records/reports
	<u> X </u> Prescribed format	
Other:	<u> X </u> Complete composition	Correspondence, equipment proposals
	<u> X </u> Prescribed format	Purchase orders

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

- Community college graduate, specialization in electro-mechanical, basic and digital electronic systems
- Ability to work alone (with or without occasional supervision)
- Excellent communication skills, ability to easily relate and respond to faculty, support staff, students
- Good mechanical aptitude
- Demonstrated proficiency in the use of microcomputers and associated software for data acquisition and analysis, word processing, report management and publication, desk top publishing
- Sound knowledge of PeopleSoft Financials

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

The position requires the incumbent work independently, consulting with immediate supervisor and/or faculty on an 'as needed' basis only

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

Technical

- maintenance and repair of lab apparatus to include the purchase of replacement or upgrades to existing equipment
- research and make recommendations to faculty on the use of current or possible new experiments in the 2nd year Physics program
- solely responsible for keeping within tight budget line(s) to accomplish the above
- student queries regarding the operation and use of electronic test equipment
- student queries regarding the use of software programs within 2nd year labs

Administrative

- any and all questions arising from discrepancies in Stores sales or purchases
- internal to UWO and external to supplier, queries on ordering, shipping, invoicing and payments by purchase order or visa purchasing card (within the realm of the position)

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

Approval on purchase of goods and services valued at more than \$10,000.00

Concerns or ideas that arise within the Lab or P&A Stores that may have a long term effect or impact on operation

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

Daily

- set-up of experimental apparatus for 2nd year lab courses
- repair, maintenance, calibration or referral of the apparatus
- 1st year lab maintenance in preparation for next lab session

Weekly

- design & construct experimental equipment used in 2nd year lab
- training of TA's with respect to equipment used in weekly lab sessions
- maintenance lab supplies budget
- reconcile courier shipping charges

Monthly

- reconcile P&A Stores purchases and sales
- bill end users on Store purchases
- retail federal and provincial tax audit against Visa purchases

Annually

- organize inventory of goods within the P&A Stores
- sale of lab manuals to 2nd year undergraduate students

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.

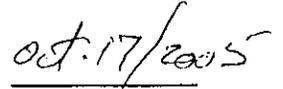
CONTACT'S TITLE (e.g. Purchasing Agents)	LOCATION		FREQUENCY			PURPOSE OF THE COMMUNICATION (e.g. to provide information concerning...)
	(inside dept)	(outside dept)	(dly)	(wkly)	(mthly)	
Faculty	X			X		Lab requirements
	X				X	Procurement of major lab equipment
	X	X	X			Stores purchases
Students	X	X	X			Supervision and guidance on safe use of lab equipment, troubleshooting & repairing of individual projects
Other support Staff	X		X			Co-operative duties
	X	X	X			Purchase orders and purchases
Financial Services		X	X	X	X	Purchase order & visa reconciliation, g.l. inquiries Invoice and tax discrepancies
Suppliers and Business Reps		X	X			Pricing, shipping, catalogues, quotes

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

Staff Member: P.S. Perquin



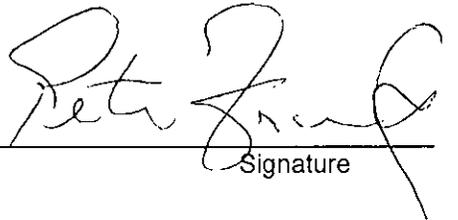
Signature



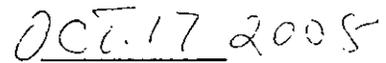
Date

Present Classification: ST5L

Supervisor: Peter Frank



Signature

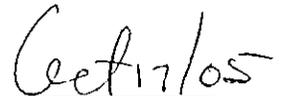


Date

Supervisor: Jackie McLean



Signature



Date



Department of Physics and Astronomy • Faculty of Science

copy

October 17, 2005

Human Resources – Western
Rm 262 Stevenson-Lawson
London, Ontario N6A 5B8

Dear Salary Administrator,

The attached position description questionnaire is being sent to you to reflect a change in responsibilities of the position of Special Technician, currently held by Phineas Perquin. Please check the current classification of this position to determine re-classification and to note new and additional position duties. To assist you in the process, the position is now 50% technical and 50% administrative, with separate supervision for each.

The influx of new Faculty, new Researchers and the creation of the NanoFabrication Facility/Laboratory has significantly changed the area of administration. The additional workload has made it necessary to find additional personnel to assist.

Should you have any questions, please contact the undersigned as extension 86441 or debruyne@uwo.ca.

Sincerely,

John R. de Bruyn
Chair
c. Administrative Officer