

1. RESPONSIBILITY FOR STAFF AND PERSONNEL MATTERS - BARGAINING UNIT

(Key: B.U. = bargaining unit: M & P = management and professional)

1(A) Role in Overall Supervision

Criteria Reads:

B.U.

- Responsible for administrative, clerical and/or diversified secretarial supervision and performance of a work unit - as group leader including supervisory responsibility for a large group of employees.
- Provides authoritative information to administrative head on all supervisory matters.

M&P

- Ultimately responsible for the overall work performance and output of a work unit.

1 (B) Role in organizing work, scheduling and training

Criteria Reads:

B.U.

- Is responsible for overseeing and directing the coordination of work of a group of bargaining unit employees at various classification levels; training, establishing work schedules and priorities; and allocating work.
- Organizes operating procedures for a variety of administrative clerical support functions.
- Initiates and adapts procedures to meet unusual situations.
- Develops new methods and procedures to deal with problems frequently requiring collaboration with other work units.
- Recommends and/or provides input into policies. Generally, this will be on a departmental basis but may be University or faculty-wide.

M&P

- Is responsible for the establishment of policies and exercises operational management in respect of the organization of work

1 (C) Role in the Reclassification of Jobs

Criteria Reads:

B.U.

- Provides input into decisions regarding reclassifications.

M&P

- Initiates or takes a position on behalf of the Department with respect to a reclassification.

1 (D) Role in Staff Selection, Evaluation of Work Performance, including Non-Disciplinary Discussions, Formal Discipline, etceteras.

Criteria Reads:

B.U.

- Provides input into staff selection and work performance evaluations.
- Conducts non-disciplinary work discussions In small departments can short list, interview applicants and make effective hiring recommendations for support staff.

M&P

- Responsible for staff selection, performance evaluation of staff, and all levels of discipline, including termination.

1 (E) Role in Approving Leaves of Absence, Overtime and/or Vacations

Criteria Reads:

B.U.

- Implements departmental policy and collective agreement provisions with respect to approving short term leaves of absence, and scheduling vacations; has input into department policy regarding these matters.
- Assigns overtime within pre-authorized amounts.

M&P

- Establishes departmental policy for approving leaves of absence, overtime, and vacations.
- Handles non-standard applications.
- Authorizes expenditures for overtime.

1 (F) Role in Collective Bargaining Negotiations on behalf of the Employer

Criteria Reads:

B.U.

- None

M&P

- Participates in developing and determining the Employer's position and contract negotiations.

1 (G) Role in Grievance Procedures on behalf of the Employer

Criteria Reads:

B.U.

- No representative role.
- Assists as a resource for factual matters.

M&P

- Represents the Employer.
- Has responsibility for taking positions in conjunction with Human Resources, for interviewing witnesses, and recommending and implementing settlements.

1 (H) Role in Preparation for Arbitrations on behalf of the Employer

Criteria Reads:

B.U.

- Assists in providing factual data.

M&P

- Works with Human Resources as the Coordinator and central resource person for a work unit.
- Instructs counsel.
- Assists in formulating settlement strategies.

1 (I) Role in Dealing with Union Representatives on behalf of the Employer

Criteria Reads:

B.U.

- None

M&P

- Represents Employer.
- In conjunction with Human Resources has authority to bind Employer

1 (J) Role in Enforcing Collective Agreements

Criteria Reads:

B.U.

- Applies the Collective Agreement, provides background information to both subordinates and superiors; warns of pitfalls and conveys alternatives.

M&P

- In addition to interpreting the Collective Agreement, makes decisions on behalf of the Employer in the event of a dispute and has authority to enforce the Collective Agreement.

1 (K) Role in Participating in Strike Strategies and Procedures for the Employer

Criteria Reads:

B.U.

- None

M&P

- Responsible for so doing in conjunction with Human Resources

1 (L) Role in Discharging Employer's Formal Collective Agreement Obligations to Consult

Criteria Reads:

B.U.

- None

M&P

- Responsible for so doing.

1 (M) Role in Advising Department/Unit Head on Labour Relations

Criteria Reads:

B.U.

- Provides advise based on authoritative information in respect of history and procedures, policies and problem situations in assigned areas; warns of pitfalls and conveys alternatives.

M&P

- Provides confidential advice on labour relations matters consistent with the Employer's objectives.

1 (N) Role in Planning, Organizing and Utilization of Staff, including Geographic Allocation of Work

Criteria Reads:

B.U.

- Participates in decision-making regarding planning, organizing and utilization of staff and position content.

M&P

- Develops organization structures.
- Decides position content, planning, organizing and utilization of staff.

2 RESPONSIBILITY FOR PERSONNEL MATTERS - NON BARGAINING UNIT

(*Personnel includes Faculty, M & P, Technical Staff, etc.)

Criteria Reads:

B.U.

- Hires, supervises and evaluates work study students, student assistants, and casual support non-academic staff, for exams, conferences or continuing education courses.
- Responsibility for wage and benefit administrative and hours of work coordination for certain technical and M&P employees.
- Keeps and updates records.
- Provides advice based on authoritative information in respect of history, procedures, policies and problem situations in assigned areas; warns of pitfalls and conveys alternatives.

M&P

- Same responsibilities as noted in Section A and C for bargaining unit personnel

3. RESPONSIBILITY FOR FINANCES

3 (A) **Responsibility on Budgetary Matters and Financial Administration of a Department or Unit.**

Criteria Reads:

B.U.

Makes financial decisions **within a predetermined and preapproved budget framework** in assigned areas:

- Monitors and reconciles budget accounts, transfers funds, and authorizes expenditures on budgets up to a certain level for supplies, and certain equipment.
- Assists in budget preparation
- Submits project proposals to appropriate level for consideration and approval.
- Provides authoritative information in calculation of academic salaries and other academic matters (provides costing)
- Formulates remedial budget measures for consideration of management, has significant and substantial input into decisions and implements these strategies following approval.
- Administers a defined budget for a program, e.g. continuing education - in such cases performs a budget planning, forecasting, etc., and makes decisions regarding program cost control initiatives.
- Administers and controls special funding appropriates, and in such matters has signing authority, (i.e. only one signature is required), and determines priorities for payment
- Conveys data to superior, upon which she/he may make academic budget decisions.
- Makes recommendations on non-academic budget for support staff and supplies and equipment.

M&P

- Responsible for operational management of an academic or administrative budget:
- Creates or establishes financial and budgetary policy.
- Makes decisions to expend budget monies on matters such as programs and major equipment.
- Makes decisions regarding cost control initiatives, e.g. decides which remedial budget measures and cost control measures will be implemented.

3 (B) Role in Negotiating and Signing Operational Contracts and Liaising with Sources Inside and Outside the University.

Criteria Reads:

B.U.

- Signs and negotiates within set parameters or a defined program.
- Liaises on behalf of the Department with other University departments to resolve financial discrepancies and to ensure monies allocated to departments are properly received and that practices and policies are properly applied.
- Provides authoritative information on financial or budgetary matters.

M&P

- Negotiates, makes decisions, and has signing discretion on matters with significant financial input.
- Liaises on behalf of the Department in negotiating new funds inside and/or outside the University.

3 (C) Responsibility for Purchasing on behalf of the University.

(i) Role with respect to Purchasing Responsibilities

Criteria Reads:

B.U.

Exercises discretion to purchase as an agent within preapproved guidelines:

- Selects suppliers for competitive bids.
- Arranges for sealed tenders and awards contracts
- Has input into purchasing decisions.
- Has authority to make expenditure decisions within a Supplies and Equipment budget.

M&P

- Makes decisions to purchase as a principal.

3(D) Role in Fundraising on behalf of the University

Criteria Reads:

B.U.

- Organizes functions
- Provides administrative support to central faculty fundraisers
- Plans and implements fundraising activities for small conferences or projects.
- Provides advice to Department Head on possible fund sources.
- Communicates with donors to provide authoritative information.
- Within a set program, reviews requirements to meet a budget, and can have authority to generate revenue.

M&P

- Initiates, develops and coordinates fundraising strategy for faculties and Departments of the University in conjunction with senior University officials.
- Meets donors to elicit funds.

4. RESPONSIBILITY FOR ADMINISTRATION IN SUPPORT OF ACADEMIC DEPARTMENTS

4(A) Administrative Responsibility and the Complexity, Diversity and Level of Accountability of Decisions made.

Criteria Reads:

B.U.

Responsible for the organization and completion of work of a complex and diverse administrative clerical nature and for diversified secretarial and administrative assistance requiring a broad and extensive knowledge of the organization and operation of the University and the work unit. In so doing, interprets and applies authoritative information on complex policies, procedures and guidelines:

- Acts as a group leader in complex clerical areas.
- Contacts other work units and/or external liaisons to obtain and disclose information on sensitive and restricted matters for the preparation of reports and memoranda.
- Performs senior confidential secretarial duties for the department Head/Dean:
- Plans and coordinates the work of subordinates including establishment of work schedules and priorities, allocation of work, assessment of training needs. Can include responsibility for the performance of a work unit.
- Plans and coordinates procedures relating to administrative support functions, such as timetable preparation, registration and examination procedures, personnel, purchasing, physical plant maintenance.
- Provides input and makes recommendations on policy matters.
- With respect to decision making, initiates and adapts procedures to meet unusual methods, scheduling priorities and coordinating and maintaining office routines which normally require input from various units and/or sources.
- Has input into matters of policy or course content.
- Responsible for the administration of a particular program within defined limits.

M&P

- Responsible for comprehensive management of a Department or work unit, including responsibility for planning and coordination of policy matters such as faculty, students, university governance and academic course content.

4(B) Role in Developing New Methods and Procedures to deal with Problem Situations.

Criteria Reads:

B.U.

- Initiates and develops methods and procedures to meet unusual and complex administrative clerical situations, frequently requiring collaboration with other work units.

For example, a bargaining unit member might develop a timeframe for all student marks to come into the office, and a method for tabulating and collating these marks, and would supervise the work in getting this task completed. This would be a procedure for the administration of marking.

M & P

- Responsible for the development of new methods and procedures, including decision making ability regarding matters of academic operation.

For example, a management and professional person might participate in developing a policy that marks be based on both oral and written work, and that testing must be performed a certain number of times per term.

4(C) Role in Research and the Production of Reports

Criteria Reads:

<p><u>B.U.</u></p> <ul style="list-style-type: none">• Compiles and analyzes data requiring considerable knowledge of the interpretation and application of department programs, policies and procedures. <p><u>M & P</u></p> <ul style="list-style-type: none">• Responsible for complex reports with respect to such issues as academic content.
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4(D) Role in Formulating, Interpreting and Applying Departmental Policies

Criteria Reads:

<p><u>B.U.</u></p> <ul style="list-style-type: none">• Provides input and makes recommendations on policy matters.• Interprets and applies policies and provides authoritative information in assigned areas. <p><u>M&P</u></p> <ul style="list-style-type: none">• Establishes, develops, and provides changes to Departmental policy.
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4(E) Role in Organizing and Administration of Academic and other Departmental and University Committees

Criteria Reads:

B.U.

In respect of administrative committees is an active member:

- Selects and assembles information involving the coordination of efforts and input from a variety of internal and external sources.
- Prepares and drafts reports
- Provides authoritative information and input on administrative clerical matters.

In respect of academic committees, typically attends as a recorder of proceedings, and is a participant in areas of own expertise. It is not an active participant in respect of academic content.

M&P

In respect of academic committees is an active member.

- Is an active participant with respect to academic content and can represent department or other administrative heads in that capacity.

4(F) Role in Student Advising

Criteria Reads:

B.U.

- Imparts interpretative and authoritative information in policies and source material to students.
- Exercises discretion in adapting procedures to meet unusual problems.
- Receives instructions only when matters depart radically from established policies.
- Refers problems that he/she cannot resolve to M&P or Faculty.

M&P

- Creates new policies, without review, to meet unusual situations.
- Provides managerial and professional counselling in relation to policy matters, e.g. establishes, develops, or provides changes to policy.

4(G) Role in Allocation of Space Planning and Organization

Criteria Reads:

<p>B.U.</p> <ul style="list-style-type: none">• When delegated responsibility, allocates and/or pursues the acquisition of academic space.• Responsible for the assignment of space to clerical staff. <p>M&P</p> <ul style="list-style-type: none">• Responsible for the acquisition and allocation of academic space both on and off campus.

4(H) Role in Making Substantive Changes to Administrative Structure and Program Content

Criteria Reads:

<p>B.U.</p> <ul style="list-style-type: none">• Provides input and participates in decision-making discussions on the basis of own area of expertise. <p>M&P</p> <ul style="list-style-type: none">• Makes and is accountable for decisions regarding organizational change to administrative structure and changes to program content.

(ii) Role in above noted matters relating to bargaining unit personnel

Criteria Reads:

B.U.

- Responsible for applying collective agreement provisions for benefits and other personnel matters, keeps records, advises department head on policies and procedures, provides authoritative information on problem areas.

M&P

- Provides the SAME.