

**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: Teresa Nobre
Title: Special Orders Coordinator
Phone: (519) 661-3871
Email: tnobre@uwo.ca
Department: Bookstore

(B) Position Information:

Current Incumbent: Teresa Nobre
Current Classification: SG 9
Classification Being Appealed: SG 9
Date Evaluation Results Letter Received: August 24, 2007

(C) Information Required For Job Evaluation Appeals Committee

Reason for the appeal:

This position has become increasingly demanding to uphold the Bookstore's reputation in the industry. In order to achieve these expectations, this position has now integrated a multi-faceted purchasing aspect. As a result, this position constantly researches books, composes quotes, places Purchase Orders and determines the most cost effective procurement methods under time constraints posed by the customer. The importance of these added responsibilities not previously expected, leads me to believe that my role contributes significantly to the financial success of the Bookstore and therefore should be classified higher.

Supporting Information (Optional):

The Bookstore has empowered this position to satisfy customer's needs by any means without any restrictions or consultation with trade Bookstore Buyer (Lynn Wilbur).

Please compare PDQ from four years ago to the current PDQ. For any clarification of these duties you may call Lynn Wilbur at ext. 84037.

(D) Approvals:

Signature of Person Appealing:  Date: Aug. 30, 2007

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

2002/05/27

AUG 30 2007

Donna Chute-Dolan

From: Steve Alb [salb@uwo.ca]
Sent: Monday, October 15, 2007 12:00 PM
To: 'Donna Chute-Dolan'
Subject: RE: JEAC Appeal

Donna,

In my opinion the role of Special Orders Clerk held by Teresa Nobre has grown less complex over the past few years. Technology and the internet have made it easier to search for books and products. The Book Manager and Books in Print programs have developed better databases and are easier to find information than before. It has become a more reliable and complete look-up mechanism. Other tools such as Amazon.com and other websites have improved to further simplify the book look-up process.

In short, the book industry has become more transparent making the role of a special orders clerk less complicated.

Steve

Steve Alb, Director
Western Retail Services
salb@uwo.ca
519-661-4293



Western Retail Services

From: Donna Chute-Dolan [mailto:perdec@uwo.ca]
Sent: September-05-07 9:24 AM
To: tnobre@uwo.ca
Cc: Steve Alb
Subject: JEAC Appeal

The UWOSA Job Evaluation Appeals Committee has received your appeal of the results of the recent evaluation of your position. The appeal will be held at one of our upcoming meetings. As per the Job Evaluations Appeals Process, any written submissions received from either the employee appealing or from their budget unit will be provided to both parties upon completion of the appeal.

You will receive a written communication of the results of the meeting once it has taken place.

10/17/2007

UWOSA JOB EVALUATION RECORDING FORM
Office support positions

TECHNICAL EVALUATION P

Dept: Bookstore **Dept. ID** _____
Job Title Special Orders Coordinator **Jobcode** _____
Incumbent: Teresa Nobre **Eval. Date:** _____

	FACTOR	COMMENTS	SUB FACT	DEGREE	PTS
I	Job Knowledge	Must gain knowledge of how to search for books (in foreign languages) - most likely to come from experience than from education since very specific skills are needed. Needs to understand book industry in terms of sources for books (new and used).	Educ	3	85
			Exper.	E	
II	Initiative	Job responds to specific requests from customers; initiative comes in in terms of searching when hit a block (e.g., edition which cannot be sold in Canada). Must search for books in foreign languages.		3	35
III	Complexity/Judgement	Set of websites which must be checked to identify supplier. 80/20 rules seems to apply -- 20% of request take 80% of time to track down. Does not make judgement calls like textbook buyer. Submits purchase orders (though often go to supervisor to combine to minimize shipping charges) but judgement involved in this is identifying best supplier.		4	35
IV	Contacts	Faculty and others who make special requests.		2	20
V	Errors	Will be unable to fulfil special request for specific customer who may take business elsewhere. (Average order is \$87 = \$200,000Total orders/2300Average annual customer order). Total revenue is increase. Total revenue (\$200,000) is 1.2% of bookstore revenue (\$16.260 million)		2	20
VI	Supervision of Others		Scope	1	5
			Char.		
VII	Effort/Demands	At computer searching websites		2	30
VIII	Physical Environment			1	10

CLASSIFICATION ASSIGNED

Total Pts: 240

Group: SG

Level: 9

Signature: Nan Weiner **DATE:** 10 Dec 2007

**POSITION DESCRIPTION
QUESTIONNAIRE**

**THE UNIVERSITY OF WESTERN ONTARIO
EMPLOYEE RELATIONS**

PRESENT INCUMBENT		POSITION IDENTIFICATION	
SURNAME	INITIALS	DEPT. NO	P.S. JOB CODE
NOBRE	T.	_____	SG9

BASIC POSITION INFORMATION

DEPT. NAME: BOOKSTORE _____

SECTION NAME: SPECIAL ORDERS

LOCATION: U.C.C. _____

WORK WEEK HRS. 35 hrs/wk. _____

SUPERVISOR SURNAME: WILBUR _____

FOR SALARY ADMINISTRATION USE			
CLASS'N	Salary Grade 9		
CLASS'D	_____	EFFECT	_____
	Date		Date
ANALYST	Referet		

INITIAL L. _____ **PHONE** 84037__

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.)

Primary objective of position

The primary objective of this position is to meet the needs of a very unique customer base who are placing special book orders, in all disciplines, from sources world-wide and who expect superior service and order fulfilment. The incumbent must research, purchase and deliver these books in a timely manner, and in so doing must exceed the customers expectations in order to enhance the Book Store's reputation as an award-winning Canadian bookstore as well as the University's reputation as one of the leading research and educational institutions in Canada. Inability to meet this objective could have a negative financial impact on the Book Store and its reputation.

Position Dimensions

Estimated annual book sales: (Store) \$16,260,000.00 – (Special Orders) \$200,000.00
 Number of suppliers: over 3,500 currently on database
 Annually average customer orders: 2,300

NO.	MAJOR DUTIES	%
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This Purchasing position reports directly to the General Books Manager, Bookstore, and performs the following duties:

- Receives special orders for books from customers, including, U.W.O. staff, faculty & students, corporations, hospitals, libraries, elementary and secondary schools from anywhere in Canada and overseas on a daily basis. These special orders can be received in person, by telephone, by e-mail, by fax or mail. – **20%**
- Researches each book order, which can be in many different languages, to ensure accuracy of data and to determine the correct supplier of the book. This is accomplished using the many tools of the trade, including web-based databases, many on-line search engines, internet websites, in-house databases and trade book directories. The incumbent decides supplier selection based on vendor's location, ability to meet satisfactory delivery criteria, pricing and returns policy. This position also composes customer quotes via e-mail, mail, telephone and in person. - **30%**

- Enters each order into the Book Store Order Entry system, which requisitions and allocates that title for

inclusion in the next purchase order batch. This purchase order is confirmed and purchased by the General Books Manager on a weekly basis for batching purposes only but the incumbent may also approve requisitions and submit purchase orders with suppliers for trade books to replenish inventories at his/her own discretion or in absence of General Books Manager. The incumbent also routinely submits purchase orders when special instructions need to be followed. – **30%**

- Tracks and traces outstanding special orders and other regular trade orders on an ongoing basis with suppliers. Incumbent communicates the status of the orders back to the customers and bookstore staff on lead-time, delivery cycle, supplier's inventory and cancellations. This position keeps abreast of slow customer pick up, and ensures cancellations are returned promptly to suppliers for full credit. – **10%**
- After Special Orders have been received from the supplier and received into the Book Store's system, they are delivered to the incumbent who verifies that they are the correct books and that they are priced as per the quote from the supplier at the time of ordering. Customers are notified of their book's arrival. Books to be delivered, and which have been paid for with a purchase order or credit card, are invoiced and delivered to Shipping. The incumbent works directly with the shipper to ensure that customer's delivery expectations are met. - **5%**

NO. OTHER DUTIES (less than 10%)

- Must provide superior customer service in all retail divisions of the store
- Must be completely knowledgeable in all aspects of the in-house computer system and to be able to maintain a clean and accurate database as time permits
- Updates daily vendor maintenance files

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 employee
-
- 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
	x _____ Complete Composition	- daily sends numerous e-mails to customers - composes customer quotes
Correspondence: <input type="checkbox"/>	_____ Partial composition with general direction (verbal or written)	
(Invoices)	x _____ Prescribed format	- customer address, books invoiced, applicable taxes & shipping instructions - quantity, isbn, book title, shipping instructions, author & publisher name
(Purchase orders)		
Reports are system generated		
Reports: <input type="checkbox"/>	_____ Complete composition	
	_____ Partial composition ...	
	x _____ Prescribed format	- special order back-order report, purchase order summary report
Other: <input type="checkbox"/>	_____ Complete composition	
	_____ Partial composition ...	
	_____ Prescribed format	-

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

- Some university courses preferred and/or knowledge of the University environment
- Some book industry experience preferred with knowledge of publishers/suppliers
- Retail experience with strong customer service skills
- Strong computer skills with knowledge of word-processing and a strong knowledge and understanding of the Bookware computer system
- Proven written and literacy skills
- Strong organizational skills and ability to multi-task and prioritise efficiently in a busy environment
- Detail oriented
- Must be able to use EDI systems
- Strong background in Purchasing and Transportation Logistics

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

- The incumbent must work under minimal or no supervision and perform various functions using own professional judgement. The incumbent is responsible to the General Books Manager for the effective performance of her duties and receives general guidelines and specific information on request.

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

- Expedite large volume of book orders just prior to fiscal year-end, especially orders on research accounts coming due
- Preparing quotes on request
- Concerns from anxious customers regarding outstanding backorders due to stock outs and out-of-prints
- Concerns from customers about price discrepancies
- Sourcing of rush orders or hard-to-find books

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

- Consults with General Books Manager whether a customer should receive a special discount based on a large order
- Prepaid purchase orders are forwarded to General Books Manager for payment with corporate credit card

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

- Undertakes the project of maintaining the purchase order module up-to-date; checking all purchase orders on back order with suppliers. This consists of checking our receiving records against supplier's shipping log and determining what's completed and what's outstanding. Deletes, adds and updates the book profile to purchase orders in order to provide bookstore staff and customers with more accurate information. This task is on going and is performed when the incumbent has some down time.
- Preserves the confidentiality of data records; filing completed customer orders in secure location – task is usually done four times a month (two hours each time)

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...)
---------------------------------------------	-------------------------------------------	-------------------------------	-----------------------------------------------------------------------------

Purchasing agents
(Corporations, Hospitals,
Educational Institutions Etc.)

outside/inside

daily

to accept orders or communicate status of orders, provide quotes via email or phone

Publishers/suppliers
(World-Wide)

outside

daily

to check pricing and availability of a book or check status of a back order

Customers
(World-Wide)

outside/inside

daily

to accept orders or communicate status of order, to provide quotes via e-mail or phone, to inform them of book arrival

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

Staff Member:

Present Classification _____ Signature _____ Date October 2007

Supervisor:

Signature _____ Date _____

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 Human Resources at extension 82194.

C. INSTRUCTIONS

1. 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 the Human Resources Department.
2. 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%)
3. 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

1. A change in duties and/or responsibilities does not automatically imply a change in classification and salary.
2. 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 _____

Department Head _____

Dean's Office _____

Date _____