

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: Barbara A. Lee
Title: Course Materials Coordinator
Phone: 519-661-3644 or 83644
Email: blee2@uwo.ca
Department: The Book Store at Western

(B) Position Information:

Current Incumbent: Barbara Lee
Current Classification: Salary Grade 11
Classification Being Appealed: no change? Salary Grade 11
Date Evaluation Results Letter Received: February 4, 2011

(C) Information Required For Job Evaluation Appeals Committee

Reason for the appeal: See attached typed pages
Thank you!

Supporting Information (Optional):

(Attach an additional page if more space is required)

(D) Approvals:

Signature of Person Appealing: Barbara Lee Date: February 9, 2011

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

February 9th, 2011

I am appealing my Evaluation of my position Course Materials Coordinator-Salary Grade 11.

On December 22, 2010 I received the results of the evaluation of my job description and I had been informed by Human Resource that although they noticed changes to my job description, the magnitude of these changes was not sufficient to suggest a change in the current classification of **Course Books Coordinator, Salary Grade 11** at this time.” I disagree with this evaluation.

After some inquiries and on the recommendation of Human Resource personnel and my Leader I was advised that I should rewrite my job description rather than appeal it because I would have a better chance for a change if I updated and added the changes to my responsibilities. My last job evaluation was in April 2003 and to say that little to nothing had changed significantly in my job or with my responsibilities in almost eight years is completely inaccurate and fueled my decision to appeal the evaluation more aggressively. At this time I had also expressed my frustration to HR that there is *at least* one other position in The Book Store at Western similar to mine and with all due respect has no more accountability, responsibility or financial impact to The Book Store at Western than I that is ranked a Salary Grade 12.

I spent considerable time on rewriting my job description on my own because my Leader had said she felt that she had let me down. HR advised me to use the language and help provided on the HR website. I thought I had added more details and wording that better represented the complex and varying skills required, responsibilities and dollar value /percentage of revenue my position helps generate for the Store. I forwarded my changes to my leader on Friday January 7th 2011. On January 18th I was asked to meet my Leader at our Director’s office to review my job description. Upon arrival I discovered that the Director and the Operations Manager had helped my Leader in the “rewrite of my rewrite”. At this point I was frustrated with how belabored the process had become. I signed off because they had obviously spent a fair amount of time discussing and rewriting my revisions and they explained to me that it was adjusted with the intent to represent me fairly. I did notice to my disappointment that day that some of the wording that I had hoped to use had been reworded or removed.

Upon a more careful review of the UWO Office Support Job Evaluation Plan structure for rating I am quite certain that the functions, duties and responsibilities of my position should rank me very high in all eight categories. I thought it best if I clarify a couple of categories where the language used by my Leader(s) wasn’t as clear as it could be.

In the category of Physical Environment, I would like to add that my working environment certainly can be disagreeable and physically demanding. I work in an open area with high levels of traffic, noise, constant disruption and at times, chaos. Many times I am also involved with the physical aspects of heavy lifting of textbooks in the receiving area or on the sales floor due to problems or special circumstances that require my attention.

In the category of Supervision, although my position is not “officially” recognized as a Manager to the Staff who reports to the Text Book Manager, I am one of the two “go to” people to whom Staff refers to for solution and guidance to problems on the sales floor. I also deal with problems brought to me by any of the receiving staff as well as any frazzled Faculty who walk into our office unannounced expecting immediate attention and assistance. Although I do not officially hire or fire staff, I do help in the interviewing process of part time Candidates hired in our department.

As Course Materials Coordinator it has been my responsibility when the Manager is away or not available, to order, trouble shoot and problem solve. I would say this validates the degree of my ability to step in and ensure that our area is well managed and represented. I am responsible for hundreds of titles/materials with various specific deadlines and terms that if not met can be disastrous to a course, the success of the Students and financial impact to our business. I am accountable to Faculty who at times can be demanding and intimidating. If their classes do not run smoothly due to a problem at The Book Store, rest assured I hear about it because the Faculty’s credibility and rating are also on the line.

I feel that due to some “wording” issues, I have not been ranked the correct Salary Grade level. I appeal to you to do what is right and fair. I would be happy to meet and discuss this appeal if further explanation is needed.

Thank you,

Barbara Lee

A handwritten signature in cursive script that reads "Barbara Lee". The signature is written in black ink and is positioned below the typed name "Barbara Lee".

UWOSA JOB EVALUATION RECORDING FORM
Office Support Plan
 (APPEAL)

Dept: The Book Store
Dept. Num. 510100
Incumbent: Barb Lee
Citte Mem.Present: UWOSA: K. Foullong, L. Johnson
 ADMIN: L. Brock, C. Bumbacco

Job Title: Course Books Coord
Eval. Date: March-02-11

I	FACTOR	COMMENTS	SUB FACT	DEGREE	PTS	Profile		
						-	=	+
I	Job Knowledge	College diploma or purchasing designation. 5 years of buying experience. May need to communicate in foreign languages. Requires knowledge of international trading issues, copyright laws	Educ	4				
			Exper.	G	165			
II	Initiative	Expected to work independently with little supervision. Take initiative to source alternative products, research options		4	55			
III	Complexity/Judgement	Analyze historical sales information. Consideration of sell through, lifecycle of used books		3	25			
IV	Contacts	Negotiates pricing and return policy with vendors. Trilingual communication		4	70			
V	Errors	Awkward - detected outise department		3	45			
VI	Supervision of Others	"Lead" responsible for 2 - 3 part time staff	Char.	2				
			Scope	A	10			
VII	Effort/Demands	Some physical effort. Critical deadlines (cyclical)		2	30			
VIII	Physical Environment	Agreeable - equivalent to office		1	10			

CLASSIFICATION ASSIGNED

Total Pts: 410

Group: _____ Salary Grade _____

Level: _____ 11 _____

Co-Chair Signatures: UWOSA: Karen Fooullong _____

ADMIN: Chris Bumbacco _____

**POSITION DESCRIPTION
QUESTIONNAIRE**

**THE UNIVERSITY OF WESTERN ONTARIO
EMPLOYEE RELATIONS**

PRESENT INCUMBENT		POSITION IDENTIFICATION	
SURNAME	INITIALS	DEPT. NO	P.S. JOB CODE
Lee	Barb	510100	SAGX19.

BASIC POSITION INFORMATION

DEPT. NAME Book Store

SECTION NAME Acquisitions

LOCATION UCC

WORK WEEK HRS. 35 Hours per week

SUPERVISOR SURNAME Murray

INITIAL Gail

PHONE X83667

FOR SALARY ADMINISTRATION USE			
CLASS'N	Course Books Coordinator (CSG 1)		
CLASS'D	Jan/11	EFFECT	N/C
	Date		Date
ANALYST	SDV		

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	%
-----	--------------	---

Acquisitions

90%

The Course Materials Coordinator is responsible for analyzing, sourcing and purchasing textbooks and related academic materials requested by faculty of Language and Arts & Humanities departments for the Book Store at Western and Books Plus. Approximately 7,000 titles are processed by this position with a minimum value of \$4,000,000.

Take initiative to source alternative products when requested material is not available. Research options and negotiate with vendor on the pricing of bundles/packages to secure the best deal for the students. Collaborate with the faculty/professor to confirm alternate product meets the needs of the professor and students.

Analyze historical sales information, on hand inventory and course enrolment to determine the quantity of textbooks to order. Consideration of historical sell through, availability of used books, life cycle of text book and professor/course expectations are also required.

Monitor backorders daily and follow-up by communicating with vendor for status of orders, and expected delivery date. Take initiative to source alternate supplier and/or options as necessary. Keep the professor/faculty informed of the status of backorders and the options available. Communicate backorder status with the Sales Floor staff who deal directly with the students; and the Receiving staff who can expedite incoming shipments if required.

Manage inventory of Language and Arts & Humanities faculties and authorize return and extension requests to avoid write-offs, while following vendor/publisher return terms and guidelines on percentage of returns to sales/purchases.

Control used book inventory of Language and Arts & Humanities faculties. Create a "want list" of textbooks to be purchased from students, other Canadian University and College stores and wholesale vendors. Communicate with faculty prior to each buyback to promote early adoption to increase the buyback want list.

Keep abreast of the course materials industry and trends including print on demand, digital and eBooks.

Research and source new vendors for the purchase of unique products requested by instructors in addition to traditional course materials. i.e. software for language labs. Negotiate with vendors on payment terms and return policies.

Liaise with faculty and professors through departmental presentations and one-on-one meetings prior to each term to promote early adoptions, buyback and educating on new technologies in higher education. Regular follow up with professors on overdue adoption orders.

Coordinate and supervise the Used Book Buyback in conjunction with the Course Materials Manager.

Train and supervise part time acquisition staff.

NO. OTHER DUTIES (less than 10%)

Responsible for creating and presenting the acquisitions department's best practices and book trends at industry conferences and trade shows.

Assume purchasing and other duties for the Course Materials Manager as needed.

Assists with the count during physical inventory, handling questions related to text books, and reconciliation.

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)	

Indirect Reports in the absence of the Course Materials Manager

Clerk II	2 -3 part time staff, sales floor staff.	training and guiding all duties performed in department
----------	--	---

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
Correspondence <input checked="" type="checkbox"/>	X Complete Composition _____ Partial composition with general direction (verbal or written) _____ Prescribed format	-compose documents corresponding information from the Book Store to faculty, departments and suppliers in a respectful positive manner. daily
Reports <input checked="" type="checkbox"/>	X Complete composition X Partial composition ... X Prescribed format	comprise surplus stock reports for departments seeking re-adoptions for non-returnable inventory buyback reports- create a want list of used books buyback reports/packing lists/invoices - publisher reports for information requests tracing, book lists,
Other <input checked="" type="checkbox"/>	X Complete composition X Partial composition ... _____ Prescribed format	letters to publishers negotiating terms of trade; verbal direction for special receiving and prices letters to customers regarding course requirements/on line book orders

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

- University degree, College diploma or purchasing designation and a minimum of 5 years relevant buying experience.
- Knowledge and understanding of inventory control and receiving procedures required
- Knowledge of the Publishing industry
- Knowledge of the University's Policies and Procedures
- Ability to communicate in foreign languages, i.e. French, Spanish, German
- Familiar with electronic/digital books
- Strong organizational and negotiating skills
- Excellent written and oral communication skills
- Experience in PeopleSoft, WorkWare, MS Office, Power Point, MS Excel, publisher web sites, Global Books in Print.
- Knowledge of international trading issues
- Knowledge of Canadian Copyright Law as it pertains to importing and selling books in Canada

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

The incumbent is expected to work independently with little supervision. Meet with the Course Materials Manager monthly and as required to discuss concerns.

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

Problems associated with acquisition of Language and Arts & Humanities titles i.e. Out of stock, edition changes, out of prints, reorders, packages and the research of rare titles or alternative distributors.

Resolve problems or complaints of faculty/customers regarding materials ordered or purchased.

Problems brought forth by shipping and receiving staff.

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

International shipments may be discussed with the Shipping and Receiving Supervisor to determine the carrier and ensure proper documentation accompanies shipment. eg. (Customs papers)

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

Daily - acquisition of new and used course materials; communication with faculty/professors on order status, new orders, problems

Weekly – tracing back order reports, review buyback reports, create buy back want lists

Monthly – approve vendor extension and return requests

Yearly – new faculty orientation presentation; plan modern language sale; distribute overstock list to faculty for future adoption

Ongoing - (prior to start of terms) – departmental presentations, one-on-one meetings prior and email reminders to departments and faculty for early course adoptions; buy back communications to faculties

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

Faculty/Departments – daily (external)

- In person, telephone and written to request or provide information regarding course books or relevant book industry information.
- Collaborate with faculty to analyze and understand their course requirements to ensure the correct materials and quantities are ordered and available for start of term. Discuss order packages and individual package components to ensure adequate stock is available for sale.
- Apprise faculty of the price discrepancies.
- Assist faculty and department liaison with research tools. eg. Publisher web sites and contact information needed.

Students – (customers) daily (external)

- Provide product information, pricing inquiries, product availability.

Publisher Sales Representatives – daily (external)

- Purchase course material, research alternative formats and package promotions
- Confirm availability and delivery dates
- Negotiate payment terms and return policies.

Buy Back Vendor – monthly as required (external)

- Product issues and volume concerns

Receiving Department – daily as required (internal)

- Status of incoming shipments
- Expedition of incoming shipments as required

Accounts Payable – daily as required (internal)

- Invoice discrepancies

Custom Course Books – daily as required (internal)

- Creation and status of Custom Course Books

Sales Floor Staff – daily as required (internal)

- Pricing inquiries, product information and availability, delivery dates

Special Orders – daily as required (internal)

- Purchase special orders as requested

Marketing – monthly (internal)

- Collaborate on marketing initiatives for Acquisitions Department

Returns Department – monthly (internal)

- Extension requests, authorize monthly returns

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

Staff Member:

Present Classification _____ Signature [Signature] Date [Date]

Supervisor:

Signature [Signature] Date [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 *Paul G. Murray*
- Department Head *[Signature]*
- Dean's Office _____
- Date *Jan 20 2011*