

**OKANAGAN LABOUR RELATIONS COUNCIL
AND
CANADIAN UNION OF PUBLIC EMPLOYEES,
LOCAL 523 (OKANAGAN VALLEY SCHOOL
EMPLOYEES UNION)**

JOB EVALUATION PLAN

September 1995

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FACTOR 1 - EDUCATION

This factor is used to measure the amount of formal academic, technical or vocational education required to undertake the duties of the position. The following characteristics of the work are to be considered in selecting a degree:

- the specialized knowledge necessary for a comprehensive understanding of the work elements involved
- the minimum formal academic, technical or vocational education necessary to perform the work.

Degree	Degree Definition
1	Required education level is completion of grade 10 or equivalent.
2	Required education level is completion of grade 10 or equivalent plus specific academic, vocational or technical training of up to one year in duration.
3	Required education level is completion of secondary school (grade 12) or equivalent or less than Grade 12 plus specialized courses.
4	Required education level is completion of secondary school (grade 12) or equivalent plus up to and including six months of specific academic, vocational or technical training.
5	Required education level is completion of secondary school (grade 12) or equivalent plus up to and including one year post secondary training.
6	Required education level is completion of secondary school (grade 12) or equivalent and graduation from a two year community college program or equivalent.
7	Required education level is completion of secondary school (grade 12) or equivalent and graduation from a three year university or community college program or equivalent.
8	Required education level is graduation from a four year university program.

NOTES TO RATERS - EDUCATION

- A. Select the education level that most appropriately meets the job requirements.
- B. The most common source of education is through formal education, such as secondary school, vocational centre, community college, university, etc.
- C. Completion of secondary school means completion of grade 12.
- D. Formal academic, technical or vocational training means a concentrated course of study in a specific field applicable to the work. If the duration of such a course is less than full-time and/or less than one year, (i.e. an academic year, September through May) then evaluate such training as being "up to one year training".
- E. The educational factor must be rated before the experience factor.
- F. Trades apprenticeships consist of a formal education component, which should be rated under this factor, and a job experience component, which should be rated under the Experience factor.
- G. If the employer requires higher qualifications than the committee feels is required see Protocol.
(Agreed on May 11, 2001 - CUPE 523/OLRC)

FACTOR 2 - EXPERIENCE

This factor is used to measure the amount of work experience required to perform the duties of the position. The following characteristics of the work are to be considered in selecting a degree:

- the application of techniques and procedures that must be learned
- the minimum amount of practical experience on any related work or work in a lesser position required to adequately perform the job
- the period of training or adjustment on the job itself.

Degree	Degree Definition
1	Up to and including 3 months.
2	Over 3 months and up to and including 6 months.
3	Over 6 months and up to and including 1 year.
4	Over 1 year and up to and including 2 years.
5	Over 2 years and up to and including 3 years.
6	Over 3 years and up to and including 4 years.
7	Over 4 years and up to and including 5 years.
8	Over 5 years.

NOTES TO RATERS - EXPERIENCE

- A. Before this factor is rated, the education factor must be established.
- B. Select the experience factor that most appropriately meets the job requirements.
- C. The experience required refers to prior experience which is related to the position being evaluated including true life skills (caring for and attending to others, "handy persons" skills, etc.).
- D. When evaluating a position on the experience factor, the evaluation should be consistent with the evaluation given under the education factor. Failure to do so could result in double counting.
- E. The characteristic "the amount of practical experience an average individual requires to adequately perform the job" refers to the minimum amount of work experience on related work or lesser positions and the breaking-in time or training period on the job itself that is needed to become competent. This minimum experience requirement is normally less than the amount of experience possessed by incumbents, since it refers to the "learning curve" function of experience and **not** total personal experience.
- F. If the employer requires higher qualifications than the committee feels is required see Protocol.
(Agreed on May 11, 2001 - CUPE 523/OLRC)

FACTOR 3 - DECISION MAKING

This factor measures the level of decision making inherent in the job with respect to the identification and resolution of problems, the exercise of judgment, the complexity of problems and the freedom to implement solutions.

Degree	Degree Definition
1	Duties are straightforward or highly repetitive and are covered by well-defined procedures or detailed instructions. Choices of action are limited and most work problems are referred to the supervisor or senior co-workers.
2	Duties are straightforward, following standardized procedures or instructions with minor variation in work procedure or task sequence. Work problems not covered by procedures or instructions are referred to the supervisor or senior co-workers.
3	Duties are varied, following established procedures and policies with some judgment required to determine the most appropriate of a limited number of alternatives. Only non-routine or unusual situations are referred to the supervisor or senior co-workers.
4	Duties are diverse or specialized, following established procedures and policies with moderate judgment required to determine the most appropriate of a variety of alternatives. The exercise of initiative is a normal requirement but is restrained by program objectives. Direction is sought when apparent solutions to problems are not within the intent of established practices.
5	Duties are complex or specialized, following broad policies, procedures, precedents or guidelines. Considerable judgment is required in the analysis of information or situations to define problems and to determine the most appropriate alternative. Only highly unusual and complex problems are discussed with the supervisor.
6	Duties are highly complex, diversified or specialized, in the application of policies, procedures, precedents and guidelines. Initiative and independent judgment are required in the investigation of problems, and in the analysis and interpretation of facts in order to determine appropriate solutions. The exercise of initiative is extensive and involves complex, far-reaching and sensitive issues. Only major issues or highly unusual situations are discussed with the supervisor.

NOTES TO RATERS - DECISION MAKING

- A. Complexity and magnitude of problems must be considered in terms of the judgment, analytical ability, and initiative required in deciding upon the appropriate choices of action.
- B. Freedom to implement solutions must be considered in terms of the existence of instructions, procedures, policies, precedents and the nature and extent of supervision received.
- C. It is important to evaluate the decision making that is permitted within the parameters and constraints of the position and not the capability of the incumbent. Initiative is the mandated authority to carry out assignments.
- D. When evaluating a position under this factor, the majority of the items of the selected degree must be met (e.g., a position meets one of the three items in Degree 2 and two of the three items in Degree 3; the position is, therefore, properly evaluated in Degree 3).
- E. Decision making permitted while temporarily covering-off for another, or more senior, position is not rated unless an incumbent is required to cover-off duties on a regular basis.
- F. Task sequence is interpreted to mean prioritization.
- G. In the absence of a written policy and procedures manual, past practices will be considered.

FACTOR 4 - CONSEQUENCE OF ERROR

This factor measures the consequence of errors which may occur in the job and the difficulty in detecting such errors.

Degree	Degree Definition
1	Errors are readily detected by routine checks and are usually limited to the particular job. Errors have no, or minimal, impact on others and are easily corrected.
2	Errors are normally detected by routine checks at subsequent work stages. Errors may affect the work of others, causing inconvenience and loss of time to correct.
3	Errors are not readily detected, although work is subject to regular review or checking. Errors typically affect the work of others and result in delays or reduction in service.
4	Errors may be difficult to detect, since work is subject only to occasional review or checking. Errors typically result in considerable delays or reduction in service and may affect public relations.
5	Errors are difficult to identify or trace, since work is subject only to general review. Errors have serious, usually short-term consequences, significant financial costs, reduced or impaired service to the public, or negative media reaction.

NOTES TO RATERS - CONSEQUENCE OF ERROR

- A. Consideration should be given to the extent to which work is checked or verified, and to the difficulty of detecting any errors. Consideration should also be given to the likelihood of an error being detected internally or externally, not necessarily as a part of the formal process.
- B. Errors may result in: loss of time, loss of money, inaccuracies in reports or records, incorrect decisions, disruption of service or adverse public relations.
- C. Errors in judgment as well as mechanical/technical errors are to be considered.
- D. Errors which are possible, but do not normally occur, should not be considered.
- E. Routine checks - every day or every job.
Regular checks - up to and including one month.
Occasional checks - over a month, and up to six months.
General checks - over six months.
- F. Light vehicle/Van Operator is equivalent to degree level 2.
- G. Degree level 2 interpreted to include - "may cause reduction in service".

FACTOR 5 - RESPONSIBILITY FOR HUMAN RESOURCES

This factor measures the continuing responsibility for the supervision and direction of staff. Consider the following:

- the nature of supervision given, that is either direct, indirect or functional
- the number of employees supervised.

Do not consider occasional supervision, such as that performed during the absence of the supervisor on annual or sick leave.

Degree	Nature of Supervision
1	The work does not have the requirement to exercise supervision. Occasionally may explain work procedures to new or inexperienced employees.
2	Although formal supervisory responsibilities are not part of the job, the job may involve coordinating and scheduling the day-to-day work of other workers or volunteers in the unit, monitoring output and task delegation.
3	Employee functions as a group leader of other workers or volunteers with responsibilities such as scheduling and assigning work, training staff, providing direction, checking work in progress and upon completion. This level does not include responsibility for personnel matters such as hiring, promoting, or appraising the work of others.
4	The work involves supervisory duties such as scheduling and assigning work, providing advice and direction, making short-term adjustments to staffing allocations, and establishing work standards and monitoring work quality and quantity standards. This level has input into decision making for all or some personnel matters such as making hiring or promotion recommendations and appraising the work of others. Supervises less than 1 FTE on an annualized basis.
5	The work involves supervisory duties such as scheduling and assigning work, providing advice and direction, making short-term adjustments to staffing allocations, and establishing work standards and monitoring work quality and quantity standards. This level has input into decision making for all or some personnel matters such as making hiring or promotion recommendations and appraising the work of others. Supervises between 1-5 FTEs on an annualized basis.
6	The work involves supervisory duties such as scheduling and assigning work, providing advice and direction, making short-term adjustments to staffing allocations, and establishing work standards and monitoring work quality and quantity standards. This level has input into decision making for all or some personnel matters such as making hiring or promotion recommendations and appraising the work of others. Supervises 6 or more FTEs on an annualized basis.

NOTES TO RATERS - RESPONSIBILITY FOR HUMAN RESOURCES

- A. Employees who are permitted (but not required) to pass work to others, to explain or to elaborate the objective, and to point out errors, are to be assigned to degree A1.
- B. To qualify for a higher degree, supervisory responsibilities must be a regular and **ongoing** requirement of the job. Rate incumbents of positions who only perform supervisory duties on an irregular basis (such as replacing a vacationing or sick supervisor) at degree A1.
- C. The "number of part-time and/or full-time supervised" may vary seasonally for some positions. In these cases, use the annual person-years supervised to determine the number of Full Time Equivalent employees (number of employees, multiplied by the number of months supervised, divided by 12 months = person-years supervised).
- D. Functional supervision involves giving technical/specialized instruction specifically of a policy or procedural nature or, related to a work project or program, to employees supervised directly and indirectly by someone else. For example, a computer programmer will receive detailed instructions from several staff members about programming requirements. Although a manager directly supervises the computer programmer, the detailed instructions received from the various staff members, which the programmer **must** follow, is **functional supervision** by the other staff.
- In contrast, the advice that a lawyer provides to the Personnel Department on matters of labour law may or **may not** be followed. The decision to follow this advice rests with the official in the Personnel Department. As a result, this type of advice is **not** functional supervision.
- E. School year employees are to be considered full time.
- F. Apply degree 3 for functional supervision or training.
- G. Apply degree 4 for job descriptions containing supervisory responsibilities.

FACTOR 6 - CONTACTS

This factor is used to measure the responsibility for effective handling of personal contacts with other staff, students, members of other organizations and the general public. Consideration should be given to the nature and purpose of such contacts. The following characteristics of the work are to be considered in selecting a degree:

- the purpose of the contact
- the extent to which tact, persuasiveness and negotiating skills are required.

	<u>A</u>	<u>B</u>	<u>C</u>
	Purpose is to exchange/discuss information in accordance with current policies and technical practices.	Purpose is to clarify/exchange and discuss information of a detailed or specialized nature (requiring specialized knowledge).	Purpose is to gain cooperation; coordinate activities or programs; mitigate high tension or emotional situations.
1. Contacts require courtesy	1	2	3
2. Contacts require tact and discretion	2	3	4
3. Contacts require human relations and communications skills	3	4	5

NOTES TO RATERS - CONTACTS

- A. It is important to analyze the purpose of the contact in conjunction with the nature of the contact. The level of the person is relevant to the extent that it serves as check on the nature and purpose of the contact (i.e. a file clerk might very well provide information to a department head but it is extremely unlikely that this file clerk would be required to explain or follow-up on matters calling for persuasiveness or negotiating skills).
- B. Contacts of a "detailed or specialized nature" are those dealing with a subject area that is complex and typically requires specialized formal training or extensive experience to enable the participants to communicate in a meaningful fashion.
- C. Overall organizational goals and objectives may refer to unit, division, department and/or corporation.
- D. In the case of letter or reports, credit is given to the signatory.
- E. Tact is: a keen sense of what to do or say in a difficult or delicate situation in order to maintain good relations with others or avoid offense
- implies both skill and consideration in dealings with others and a sympathetic understanding in observing the feelings of others
 - skill involved in creating a good impression when meeting strangers or in handling a new or difficult situation.
- F. Discretion is: cautious reserve especially in speech
- ability to make decisions which represent a responsible choice and for which an understanding of what is lawful, right or otherwise is presupposed.
- G. Communication skills include skills such as oral presentation skills, writing skills (reports, correspondence) listening and observation skills.
- H. Human relations skills include such skills as empathy, sensitivity, understanding of human and organizational behaviour, motivational techniques and counselling skills.

FACTOR 7 - PHYSICAL DEMAND

This factor refers to the physical fatigue that results from performing the duties of the job. The following characteristics of the work are to be considered in selecting a degree:

- the frequency of performing tasks that cause fatigue, i.e. occasional, frequent, almost continuous
- the requirements to assume an uncomfortable or awkward posture
- the requirement to lift, push or pull objects.

Degree	Degree Definition
1	The work involves occasional light physical activity.
2	The work involves frequent light physical activity or occasional moderate physical activity.
3	The work involves almost continuous light physical activity or frequent moderate physical activity or occasional heavy physical activity.
4	The work involves almost continuous moderate physical activity or frequent heavy physical activity.
5	The work involves almost continuous heavy physical activity.

	Occasional	Frequent	Almost continuous
Light	1	2	3
Moderate	2	3	4
Heavy	3	4	5

NOTES TO RATERS - PHYSICAL DEMAND

- A. In applying this factor, consider the fatiguing effort of the tasks performed rather than the strength or energy needed to perform the task. Always assume that each job will be carried out by persons of adequate physique for the type of work involved, regardless of sex.
- B. Examples of physical activity:

Physical Activity	Example
Light	Lifting light weight objects and standing up to 50% of the work day.
Occasional light	Standing up to 50% of the work day.
Frequent light	Sitting between 50-70% of the work day.
Almost continuous light	Sitting over 80% of the work day.
Moderate	Working in awkward positions or confined spaces, climbing ladders, lifting medium weight objects, and standing between 50-80% of the work day. Working on a computer, typewriter or word processor for lengthy (more than two hours) periods which cannot be interrupted is defined as working in an awkward position.
Occasional moderate	
Frequent moderate	
Almost continuous moderate	
Heavy	Lifting heavy weight objects, standing over 80% of the work day, digging, use of heavy tools.
Occasional heavy	
Frequent heavy	
Almost continuous heavy	

- C. By convention, the following definitions are used:
- i) **light weight:** 1 - 20 lbs.
 - ii) **medium weight:** 21 - 35 lbs.
 - iii) **heavy weight:** over 35 lbs.
- D. The **frequency** of physical demands must be related to work on a continuing basis throughout the year:
- Occasional** - means once in a while over a period of time, i.e. once in awhile on a daily basis or several times daily but not every day
 - Frequent** - means often over a period of time such as several times daily almost every day
 - Almost continuous** - means that with the exception of coffee and meal breaks, the activity is continuous almost every day.

NOTES TO RATERS - PHYSICAL DEMAND**E. Definition of "work period".**

Follow the normal process by determining the facts that apply to the specific job being evaluated. Then this job should be reviewed relative to other jobs for each factor.

This may require looking at a day, a week, a month or even seasons.

In order to maintain the relativity the work period reviewed would be in relation to a full-time position of 7 or 8 hours. (Ignore any difference between 7 and 8 hours as this results from historical collective agreement reasons). If the job is normally a full-time job then rate it as such.

If the position would not be based on a full-time position, the rating sheet that is completed by the Committee should note that the rating is based on a reduced work period.

Examples:

1. Job #109B (School Meals Program Worker) works 1 1/2 hours per day. The 1 1/2 hours is continuous heavy lifting but it would only be for 1 1/2 hours out of a 7/8 hour day therefore it was rated as a moderate.
2. Job #115C (Storefront Tutor) works two, 6 hour days. This was 12 hours over 35 hours.
3. Job #104 (Teacher Assistant) works 5 hours out of 7 and therefore it should be looked at as 5 out of 7.
4. A 4-hour custodian will still be rated based on an 8-hour day as that is the nature of the job.

(Agreed on May 11, 2001 - CUPE 523/OLRC)

FACTOR 8 - SENSORY DEMAND

This factor refers to the sensory fatigue that results from performing the duties of the job. The following characteristics of the work are to be considered in selecting a degree:

- the frequency of performing tasks that cause sensory fatigue, i.e. occasional, frequent or almost continuous
- the length of time spent on tasks that cause sensory fatigue, i.e. short, intermediate or lengthy.

Degree	Degree Definition
1	The work involves occasional short periods of concentration which result in only normal sensory concentration.
2	The work involves frequent short, or occasional intermediate periods of sensory concentration.
3	The work involves almost continuous short, or frequent intermediate or occasional lengthy periods of sensory concentration.
4	The work involves almost continuous intermediate or frequent lengthy periods of sensory concentration.
5	The work involves almost continuous lengthy periods of sensory concentration.

NOTES TO RATERS - SENSORY DEMAND

- A. In evaluating this factor, the fatigue resulting from visual and/or auditory (listening) concentration must be determined. To do this analysis, analyze the character of the activities and determine the phases of the work requiring a concentrated effort, their duration and frequency.
- B. Sensory concentration is the focusing of the senses (i.e. eyes, ears, etc.) on various phases of the work, i.e. read, drive, do precision work, counselling, operating a word processor or dictaphone, etc.
- C. The **duration** of sensory concentration is measured in terms of:
- Short (about one hour or less)
 - Intermediate (more than one hour but less than two hours) or longer
 - Lengthy (more than two hours) periods of activity.
- D. The **frequency** of short, intermediate or long periods of sensory concentration must be related to work on a continuing basis throughout the year:

Occasional - means once in a while over a period of time, i.e. once in awhile on a daily basis or several times daily but not every day

Frequent - means often over a period of time such as several times daily almost every day

Almost continuous - means that with the exception of coffee and meal breaks, the activity is continuous almost every day.

	Occasional	Frequent	Almost continuous
Short	1	2	3
Intermediate	2	3	4
Lengthy	3	4	5

- E. Definition of "work period"
See Notes to Raters - Factor 7 - Physical Demand.
(Agreed on May 11, 2001 - CUPE 523/OLRC)

FACTOR 9 - WORKING CONDITIONS

This factor is used to measure the frequency of exposure to undesirable or disagreeable working conditions under which the work is performed. The following characteristics of the work are to be considered in selecting a degree:

- exposure to such unpleasant or disagreeable conditions as dirt, dust, temperature extremes, fumes, chemicals, obnoxious odours, noise, vibration, inclement weather, poor lighting, requirement to be "on call"
- exposure to hazards which present a risk to health or personal safety.

Degree	Degree Definition
1	The work is performed in an environment with almost no exposure to disagreeable conditions and/or hazards.
2	The work is performed in an environment with occasional exposure to minor disagreeable conditions and/or hazards.
3	The work is performed in an environment with frequent exposure to minor or occasional exposure to major disagreeable conditions and/or hazards.
4	The work is performed in an environment with almost continuous exposure to minor or frequent exposure to major disagreeable conditions and/or hazards.
5	The work is performed in an environment with almost continuous exposure to major disagreeable conditions and/or hazards.

NOTES TO RATERS - WORKING CONDITIONS

- A. **Standard office environment which includes deadlines, interruptions, occasional variations in temperature and noise will be rated as degree 1.**
- B. Typical **minor** undesirable and disagreeable conditions are as follows:
- i) minor conditions of dust, dirt, fumes, heat or cold, obnoxious odours, noise, vibration, inclement weather, poor lighting
 - ii) minor health and accident hazards including the possibility of lost time accidents and/or exposure to infectious diseases
 - iii) exposure to behaviourally difficult persons
 - iv) minor cuts, burns, bruises, etc. Injury causes slight discomfort for a short period of time, little inconvenience to work, and requires at most a simple protective dressing.
- C. Typical **major** undesirable and disagreeable conditions are as follows:
- i) extreme conditions of dust, dirt, fumes, heat or cold, noise, vibration, inclement weather, poor lighting
 - ii) health and accident hazards of a serious nature involving lost time or which may result in partial or permanent disability
 - iii) exposure to violence
 - iv) severe cuts, burns, bruises, other serious injury. Injury extends beyond the day of occurrence, necessitates change in work pattern, requires medical attention, and involves lost time.
- D. The **frequency** of exposure to undesirable working conditions must be related to work on a continuing basis throughout the year:
- Occasional** - means once in a while over a period of time, i.e. once in awhile on a daily basis or several times daily but not every day
- Frequent** - means often over a period of time such as several times daily almost every day
- Almost continuous** - means that with the exception of coffee and meal breaks, the activity is continuous almost every day.
- E. Consider only those conditions which are inherent in the nature of the work. Do not consider extreme situations, that is, where the risk of a specific accident or situation occurring is unlikely.

- F. Do not consider conditions which are recognized through Collective Bargaining, and for which premiums are paid.

	Occasional	Frequent	Almost continuous
Minor	2	3	4
Major	3	4	5

- G. Definition of "work period"
See Notes to Raters - Factor 7 - Physical Demand.
(Agreed on May 11, 2001 - CUPE 523/OLRC)