Guide

to the

USW Local 4120

Salary Program

2000.03.03

changes from UGSA to USW Local 4120 made in February 2002
A Guide to the USW Local 4120 Salary Program

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A. INTRODUCTION

(1) RELATIONSHIP OF JOB EVALUATION MANUAL TO THE COLLECTIVE AGREEMENT

In Memorandum of Understanding #8, originally dated the 7th day of June, 1991, Job Evaluation, “The University of Guelph and the University of Guelph Staff Association [United Steelworkers, Local 4120] agree that the Staff Association will continue to participate in the monitoring and maintenance of the University of Guelph Job Evaluation system for U.G.S.A. [USW] Members of University Staff (MUS). The mechanism whereby this was achieved was determined by the Joint Pay Equity committee, which included establishing criteria for resolving disputes. The University and U.G.S.A. had joint and equal representation during this process.”

The Job Evaluation system was developed jointly by the University of Guelph and the United Steelworkers, Local 4120. Several job evaluation plans were evaluated and one was selected that reflected the values of the institution and recognized skill, effort, responsibility and working conditions. The Aiken Plan, which was chosen, was refined to meet the joint needs of the University and the Staff Association.

The purpose of this handbook is to provide USW Local 4120 members with descriptions of the University of Guelph / USW Local 4120 Job Evaluation Plan, the Terms of Reference of the Joint and Equal Job Evaluation Committee and the USW Compensation Schedule.

The gender neutral Joint and Equal Job Evaluation Plan was used to evaluate USW Local 4120 jobs for Pay Equity purposes. Once all jobs were evaluated the results were used by the negotiating parties to develop a compensation schedule such that jobs of similar value would be compensated in the same salary range.

The Job Evaluation Plan will continue to be used for evaluation of newly created USW Local 4120 jobs and reclassifications. The results of job evaluation will determine the appropriate salary band.

This ongoing job evaluation process will ensure that pay equity will be maintained and jobs will be compensated equitably.

This manual was developed jointly by:
For the University: For the United Steelworkers, Local 4120:

Jane Watt Angie McLaughlin Sheila Trainer Diane Boyd
Rosemarie McHugh Alan Miller Eunice Cummings

Dated: 93 08 17
(2) THE PURPOSE OF JOB EVALUATION

JOB EVALUATION

The purpose of job evaluation is to establish the relative ranking of jobs, usually for pay purposes. This is done by means of systematic and detailed analysis of job content.

Systematic job evaluation is based on three premises:

• Certain identifiable elements or factors are present in all jobs.
• These factors exist to varying degrees.
• Each identifiable factor can be objectively measured.

In this way dissimilar jobs can be compared.

JOB EVALUATION AND PERFORMANCE MEASUREMENT

During the job evaluation process, attention is directed only towards the job duties and responsibilities. How well the job is actually performed by an individual is distinct and separate to the job evaluation process. The job evaluation committee must make no attempts to appraise the performance or potential of individuals in their job. Rather, this is done by the supervisor or manager as part of the regular performance appraisal process.

JOB EVALUATION FACTORS

There are four basic identifiable factors in all jobs that all job evaluation systems must be capable of measuring. These are:

• Skill
• Effort
• Responsibility
• Working Conditions

The job evaluation system described here uses nine factors. See B(1) and B(2) for further details.

POINT-FACTOR EVALUATION METHOD

Job evaluation methods vary. The method of job evaluation described here is one of factor comparison plus factor analysis plus point evaluation. It is known as a Point-Factor plan. Point-Factor plans are considered to be particularly suitable for purposes of pay equity compliance.
B. UNIVERSITY OF GUELPH / USW Local 4120 JOB EVALUATION PLAN

(1) DESCRIPTION OF THE JOB EVALUATION FACTORS

COMPLEXITY/JUDGMENT

This factor deals with the decision-making aspects of the position. Complexity refers to the variety and relative difficulty of the material or information upon which decisions are based. Judgment refers to the use of knowledge and experience in making the decisions. Grade levels increase in relation to the variety of issues and activities, and to the difficulty of the problems and decisions dealt with.

EDUCATION

Education refers to the training necessary to prepare an individual to satisfactorily fill a position. It reflects the level of formalized knowledge necessary to fulfil the requirements of the position. It does not mean that a designated amount of formal education is an absolute necessity. Such knowledge is most commonly acquired as a result of time spent in schools, colleges, universities or other formal instruction programmes. Application of this factor should not be confused with either the basic education of a particular incumbent or with employment standards established to ensure adequate background for advancement within the organization. Today’s educational levels and standards should be used. This factor is closely associated with the following one for “experience”. Rating under the Experience factor should reflect the educational level assigned in this factor.

EXPERIENCE

Work experience measures the length of time, (in months or years), required to learn, under instruction or guidance, the essential techniques and skills called for by the job. The experience will be gained on the job under consideration, as well as on prior jobs where the same or more elementary principles and techniques are used, and also on related jobs where one can build up a body of knowledge essential to the proper performance of the job. The amount of work experience represents the fastest structured on-the-job learning time with all non-learning periods removed. Thus, it is always an artificially compressed time period. It is not the same as “years of experience” often used for promotion or hiring purposes. Assume that the incumbent starts with the educational level specified in the Education factor.

INITIATIVE

Initiative refers to the degree of independent action required. It also considers ingenuity, creative imagination, and original thought which may be needed on the job. It is limited by the amount of direction and control received from either personal supervision or standard practices and precedents.
RESULT OF ERRORS

This factor appraises the likelihood and the probable effect of errors on the job. Consider the extent of losses to the organization which may result from mistakes occasioned by insufficiently considered decisions or judgments. Consider a typical instance, not a rare or extreme one. Only in lower level positions is consideration given to carelessness. (Result of Errors is also used to evaluate responsibility for the safety of others.)

CONTACTS

Contacts refers to the relative importance to the organization of necessary working relationship of the position holder with other people. The contacts can be internal or external to the organization. Contacts are of a personal nature: talking face-to-face, on the telephone or public appearances.

CHARACTER OF SUPERVISION

Character of Supervision considers the degree, kind and intricacies of line supervisor responsibility, OR; the nature of functional supervision, technical direction or advice involved in staff relationships. Consider the extent to which responsibility for results goes with the position - in terms of operations, policy, personnel and finances. Apply zero points if no supervisory activities are required. (Note: The size of the group is measured under Scope of Supervision.)

SCOPE OF SUPERVISION

Scope of Supervision appraises the size of the direct-line responsibilities measured in total number of people within the organizational unit supervised. Apply zero points if there are no subordinates.

PHYSICAL DEMANDS

Physical Demands considers the degree and severity of exertion associated with the position. Consider the intensity and severity of the physical effort or visual attention required by the job as well as the continuity and frequency of that effort.

WORKING CONDITIONS

Working Conditions evaluates the disagreeableness of the job environment from the employee’s standpoint. It also includes the degree of health hazard and any aspects of necessary travel or unusual hours occasioned by the job.
(2) WEIGHTING OF FACTORS

When choosing factors, the University of Guelph and United Steelworkers, Local 4120 Joint Committee ensured that they were not biased according to gender and that the factors could be applied equally to men and women. For example, working with people, (a feature common to the female job classes), and working with machines, (a feature common to male job classes), were each given consideration in the evaluation process.

<table>
<thead>
<tr>
<th>Sub Factor</th>
<th>Definition</th>
<th>Level</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Skill - 46.2%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complexity - Judgement</td>
<td>Measure of variety, difficulty and decision-making aspects</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td>Formal knowledge required for work</td>
<td>Does the job require elementary school, secondary school? College or a university degree?</td>
<td></td>
</tr>
<tr>
<td>Experience</td>
<td>Time to acquire job skills/competence</td>
<td>How much on the job training is required to perform the work: 1 month, 6 months, 3 years or five years?</td>
<td></td>
</tr>
<tr>
<td>2. Effort - 13.2%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initiative</td>
<td>Measure of direction received and level of job control required; refers to the degree of independent action required</td>
<td>Do you work under close supervision or frequent supervision? Do you work with just general direction and guidance, or do you work independently on policy making activities?</td>
<td></td>
</tr>
<tr>
<td>Physical/Mental Demands</td>
<td>Physical and mental exertion such as lifting, manual dexterity, visual concentration, mental concentration, fine motor skills</td>
<td>Does the work cause undue fatigue, considerable standing, little physical effort or continuous heavy effort.</td>
<td></td>
</tr>
</tbody>
</table>
3. Responsibility - 36.2%

<table>
<thead>
<tr>
<th>Sub Factor</th>
<th>Definition</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility for Errors</td>
<td>Measure of seriousness of potential errors in judgement or action; considers a typical instance, not a rare or extreme one</td>
<td>Are errors readily detected? Do errors have limited or considerable impact on the work of others or do they cause a serious breakdown in the operation of the university?</td>
</tr>
<tr>
<td>Contacts</td>
<td>Type and importance of work relationships</td>
<td>Does the work require contact with immediate associates, important contacts in which recommendations are presented, or contacts beyond the university which are vital to its operation?</td>
</tr>
<tr>
<td>Supervision</td>
<td>&gt; Nature of supervisory responsibilities</td>
<td>Do you give little supervision, limited supervision, general supervision or do you give policy direction?</td>
</tr>
<tr>
<td></td>
<td>&gt; Number of staff supervised</td>
<td>How many staff do you supervise? One?, 5-10?, more than 50?</td>
</tr>
</tbody>
</table>

4. Working Conditions - 4.4%

<table>
<thead>
<tr>
<th>Sub Factor</th>
<th>Definition</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working Conditions</td>
<td>Work environment and job requirements. Unpleasant conditions which are inherent in the job and which will not change even if job location changes</td>
<td>In the workplace are there minimum disadvantages or disagreeable conditions? Is there continuous exposure to severe factors?</td>
</tr>
</tbody>
</table>
C. JOB FACT SHEET

(1) GUIDE TO COMPLETING A JOB FACT SHEET

The Job Fact Sheet is part of a systematic and detailed analysis of job content, normally completed by the employee and the supervisor and is not a job description. Job Postings are intended for recruitment purposes only and should not be construed as official University job descriptions or job fact sheets. When a probationary employee is the first incumbent in a “new” position, then upon successful completion of his/her probationary period, the supervisor and the employee will review the job fact sheet to ensure that it is an accurate reflection of the duties of this new position.

GUIDELINES TO EMPLOYEES

The following guidelines are provided to employees and supervisors to assist in collecting job information. A sample of University of Guelph Job Fact Sheet is found in Appendix B of this manual.

The Process

Complete the job fact sheet, as best you can, using these instructions.

A job fact sheet template may be available from Human Resources or the USW Local 4120 office.

Your job fact sheet should be completed in consultation with your supervisor.

After you and your supervisor sign the job fact sheet confirming its accuracy and completeness, it must be reviewed and signed by the Chair or Department Head and then the Dean or Director.

Completing a new job fact sheet takes time and effort

Consider a minimum of 1-2 hours of concentrated time. If you are working from an existing job fact sheet, it might require less time.

Remember that we are looking at the job as it exists today

Your job as it exists may be somewhat different from what you wish it were or think it could be. Just be honest with current facts.

We are not dealing with personalities, levels of performance or potential ability

This is not an attempt to measure your performance on the job. That is a separate process between you and your supervisor. See Section “E”.

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The job fact sheet does not measure your capabilities or credentials. Some people have certain talents and experience which would allow them to handle a different job or an advanced level job. However, we are dealing here with the job as it currently exists. If you have questions about this, speak to your supervisor.

Stand back from your job to gain perspective

To help you complete the job fact sheet, think about the job over the process of one year. A lot of jobs include different activities or different emphasis at different times of the year. Several of the questions require this kind of year-long orientation.

EXPLANATIONS OF JOB FACT SHEET SECTIONS

1. Position Identification

This is basic identifying information so we can keep track of completed job fact sheets. It is fairly straightforward and self-explanatory.

When the job fact sheet is presented to the Job Evaluation Committee, this section will have been detached by Human Resources and cross-referenced by department and position title to the same box on the following page. This is done in an attempt to ensure that this information does not influence the job evaluation rating.

2. Job Description

Most people can describe their job in three to six major activities or responsibilities. Describe each by a phrase, and estimate, (to the nearest 5% to a total of 100%), the percentage of time per year you spend on each. Then describe each activity using details or examples.

Describe each activity clearly, accurately and concisely. Use clear action verbs to describe things that you do in connection with each one, (see Appendix 3 for glossary). Avoid using any gender biased wording, (e.g. he or she), in describing your work.

The following are three examples:

Activity: Human resource and budget management
(15%)

Selects, trains, orients, and assigns staff. Develops standards of performance and monitors and supervises staff. Evaluates performance and makes recommendations for personnel administration such as salary increases, promotions and discipline. Encourages professional development of department personnel through training programs and external conferences and seminars. Develops and recommends department operating budget and ensures that department operates within allocated funds.
Activity: Receptionist functions (60%)

Provides assistance, guidance and direction to visitors. Responds to in-person and telephone inquiries, ascertains the nature of business and directs to the appropriate location or individual. On telephone inquiries, either provides basic information, takes a message or refers the call to the appropriate person. Pages staff in emergency situations.

Activity: Plumbing functions (70%)

Prepares pipe and plumbing fixtures for installation, replacement or repair by threading, measuring, and shaping pipes and fixtures. Disassembles old systems and cuts holes in walls and floors for pipes to pass through. Performs pressure tests on piping and gas lines to ensure proper functioning. Solders and caulks broken pipes to replace defective piping or fixtures. Opens clogged drains. Thaws frozen pipes. Installs and repairs medical gas lines in operating rooms. Repairs and replaces gas lines in stoves and broilers. Repairs and overhauls pumps and heat exchanges. Replaces valves and associated equipment on steam systems or broilers.

3. Education and Specific Training

If you were to train a replacement for your job, what would be a reasonable entry level of education required to allow the person to steadily become a competent performer on the job? Are any special skills, licences, certification or training needed?

Please do not list your personal qualifications in this section. Identify the minimum academic/formal training requirements a new person needs to perform the job at the minimum acceptable level.

Indicate the minimum academic training required in point (a).

If there is any professional, vocational or Provincial certification, degree/diploma or licence required, specify what it is and indicate if it is mandatory or preferred within point (b).

If there are any other special skills or training beyond those identified in points (a) and (b), list them in point (c).

Any equipment which you personally operate, (as opposed to any equipment available or used in your department), should be specified in point (d).
4. Experience

If someone had the education in question 3, and could be coached on-the-job to be able to move as quickly as possible to perform it competently, what would be the minimum time required? In other words, how much concentrated learning time is required to gain the relevant experience. Relevant experience may be gained on-the-job or elsewhere, (e.g. prior relevant experience).

Simply check the appropriate box for the sum total amount.

5. Initiative (Independence of Action)

Give up to three brief examples of the important decisions which you make on the job without reference to a supervisor or subsequent check. Also list three examples of important decisions on which you seek consultation with, or approval from a supervisor. What guidelines, manuals, policies, procedures, regulations, etc. are available to guide your decision-making and actions?

6. Impact of Errors

Describe examples of typical major errors that could reasonably be made in your job. This does not mean mistakes as a result of carelessness or neglect. We are trying to find out the consequences of your actions taken, or decisions made, even with due care.

7. Working with Others

On the top portion, mention, (by position title), the main contacts you have on a regular basis, in person, by telephone or through written form, within the University. Also specify the purpose and frequency, (daily, weekly, monthly, quarterly, annually).

On the bottom portion, list the positions or individuals outside the University with whom you have contact, the purpose, frequency and medium, (i.e. oral and/or written).

8. Supervision or Direction Exercised

For USW Local 4120 positions, ‘A’ and ‘B’ might apply, e.g. check ‘A’ if you assign and check the work of others doing work similar to yours. Check ‘B’ if you provide technical or functional guidance to other staff or graduate students. See glossary for definitions of “functional guidance”, etc.. “Other” applies to supervision of graduate students in training and/or volunteers. Again, specify the type of supervision given and indicate if it is students and/or volunteers.
9. Employees Supervised

Indicate the total number of full-time and part-time employees for whose work you are fully accountable. For part-time employees, also state the full-time equivalency. The “Combined Total” is the sum total of the number of full-time employees plus the full-time equivalency.

Leave this section blank if you are not responsible for the hiring, termination, authorization of overtime, performance assessment and discipline of any full-time staff.

If you are responsible for volunteers and/or graduate students indicate the number of each, separate from the number of employees for whom you are accountable.

10. Physical, Mental and Visual Demands

Mark down the appropriate percentage level of any elements of the job that are particularly demanding. We are trying to assess the degree and severity of exertion associated with your job.

The exertion section should add up to 100%. The other sections do not.

For lifting, check the box indicating the amount of weight you are required to lift of a typical item, (e.g. laboratory equipment, animals, tools/equipment, etc.).

For the visual, audio and mental concentration, identify what you are focusing on, (e.g. a visual display terminal).

If there is any other type of physical, mental and/or audio-visual exertion which this job requires, specify what it is under “Other”.

11. Working Conditions

Explain any unpleasant aspects or conditions which present some level of disagreeableness in your working conditions and which are inherent in your job, (i.e. which would not change even if the job location did change). Indicate, as well, if your job requires any travelling and to what extent, (e.g. overnight, extended periods, etc.).

You decide if the conditions are “Minor” or “Major”.

In part (b), the reference to travel does not include commuting to and from work. It applies only in cases where travel and/or driving is part of the job, (i.e. on the University’s behalf).

When you have completed your job fact sheet, go over it with your supervisor, as necessary. Make changes for completeness and clarification as appropriate. Be prepared to sign your job fact sheet as a full and factual statement describing your job.
D. MANDATE

USW Local 4120 JOB EVALUATION STEERING COMMITTEE

97 10 01

The University and the USW Local 4120 agree:

◆ To work together in the education of USW Local 4120 members and their supervisors about the job evaluation process.

◆ To jointly develop a communication strategy and a job evaluation guide.

◆ To be responsible for the composition of the USW Local 4120 / University Joint Job Evaluation Committee based upon recommendations from the USW Local 4120 Executive and the Human Resources Division.

◆ To be responsible for ensuring the integrity of the job evaluation process by the members of both the USW Local 4120 Steering Committee and the USW Local 4120 Job Evaluation Committee.

◆ To design appeal and reclassification procedures and to deal with any other issues that may arise regarding job evaluation.

◆ To monitor the work of the USW Local 4120 Job Evaluation Committee and make recommendations.

◆ To review the Job Evaluation results twice annually, normally in June and December.

DISCLOSURE

Steering Committee members will have access to a copy of the job evaluation manual, which is located in the USW Local 4120 Office.

COMPOSITION

The Committee shall be comprised of not more than four (4) each of USW Local 4120 members and University members.

The Human Resources Division will provide a Recording Secretary.
E. JOINT AND EQUAL JOB EVALUATION COMMITTEE

(1) TERMS OF REFERENCE FOR USW Local 4120 EVALUATION COMMITTEE

1. **Representation:** The USW Joint Job Evaluation Committee will be comprised of three (3) USW Local 4120 representatives and three (3) University representatives. There will also be three (3) alternate members trained from USW Local 4120 and the University respectively at all times, to attend in the event that one of the representatives is unable to attend.

2. **Term:** Recognizing the need for consistency in the Committee, all members will serve a period of not more than two (2) years, except in extenuating circumstances. After two years, one (1) committee member from the University and one (1) committee member from USW Local 4120 will step down. It is understood that should committee members need to step down for reasons other than the rotation process outlined, that they will give reasonable (six (6) months) notice.

3. **Character of Membership:** The Committee will be comprised of members who are knowledgeable about the University environment/structure. The USW Local 4120 and the University will attempt to ensure that their membership include broad representation and, if at all possible, from different departments, and be balanced by gender.

4. **Confidentiality:** Committee members agree that all content and evaluation results will remain strictly confidential.

5. **Quorum:** There will need to be two (2) representatives present from USW Local 4120 and the University respectively to achieve quorum.

6. **Frequency of Meetings:** Meetings will occur as required. The meetings shall be scheduled by mutual agreement of the committee members. Once the meeting has been arranged, it will be the responsibility of the committee members to arrange for an alternate to attend on their behalf should they be unable to attend.

7. **Conflict of Interest:** Committee members will excuse themselves when the following positions are being evaluated:
   
   (1) their own position;
   (2) a position directly impacting their own;
   (3) where there is a direct reporting relationship; or
   (4) that of a “relative” as defined by the Human Resources Manual.

   In these cases, an alternate member will perform the evaluation to avoid a “conflict of interest”.

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8. **Resource Person:** The Human Resources Division will provide a resource person who will be non-voting, to maintain records and schedule meetings and bring in information as required by the Committee. The resource person will provide job evaluation results to the University and to the USW Local 4120 in a timely manner.

9. **Recording of Results:** Recording of evaluation results will rotate among Committee members.

10. **Consensus:** The Committee will perform job evaluation and factor analysis for new jobs and classification requests, as well as other positions that are forwarded to the Committee for review. The Committee will reach decisions by consensus.

11. **Audits:** The Job Evaluation Steering Committee will ensure that regular audits of jobs occur. It is expected that departments will submit a new job fact sheet if the current job fact sheet is three (3) years or older.

12. **Appeal:** Positions that are evaluated by the committee are subject to appeal by incumbents and/or their supervisors. The appeal committee shall consist of one (1) core member from USW Local 4120 and the University plus one (1) alternate from USW Local 4120 and the University, and two (2) former core members from USW Local 4120 and the University. Four (4) representatives from USW Local 4120 and the University will be required. Grounds for appeal are specified in the “Guide to the USW Local 4120 Salary Program”. (See page 19 - (1)).

13. **Preliminary Evaluations:** For job posting purposes a preliminary evaluation may be done by Human Resources. When the position is filled, the job fact sheet will be reviewed by the incumbent and supervisor prior to submission to the joint committee for evaluation. This is to be done within six (6) months of the date of hire.

14. **Regular Full-time in Established Positions:** Will be evaluated by the Joint and Equal Job Evaluation Committee.

15. **Temporary Full-time Greater than 6 months:** Preliminary evaluations may be done by Human Resources, and will be evaluated by the joint committee.

16. **Temporary Full-time Appointments of 6 months or less:** Will be placed on grid by Human Resources. If extended beyond 6 months, #14 above will apply.

17. **Signatures:**
   (i) Job Fact Sheets and any addendum should be signed by the employee, the supervisor, chair/director/dean.
   (ii) When the Job Fact Sheet has been signed by the employee and supervisor, it will be submitted to the chair/director/dean within ten (10) working days, for approval or denial. If the Job Fact sheet is denied by the chair/director/dean, reasons will be provided to the supervisor and the incumbent. If the employee is not satisfied with the reasons, they may pursue a complaint as provided under Clause 8.04 of the Collective Agreement and Memorandum of Understanding #4. If the Job Fact Sheet is approved by the chair/director/dean, it shall be submitted to Human Resources within ten (10) working days. The USW Local 4120 will be notified in advance of those Job Fact Sheets proceeding to Committee for evaluation or appeal.
F. PROCEDURES FOR JOB EVALUATION SUBMISSION

(1) MANDATE

The Joint and Equal Job Evaluation Committee deals with evaluations of vacant or new jobs and jobs that have significantly changed, (reclassifications), for the purpose of placing an incumbent in a salary band.

(2) PERFORMANCE APPRAISALS

Integral to any “performance appraisal” is a review of the job fact sheet. The job fact sheet is a key source of information regarding expectations and goals for any position. Supervisors and employees are encouraged to review the job fact sheet annually during the performance appraisal. Any modification, whether an addition or a deletion, should be discussed. Together it should be determined if the “change” is significant enough to warrant evaluation by the Joint Job Evaluation Committee.

(3) SUBMISSION OF JOB FACT SHEET TO JOINT JOB EVALUATION COMMITTEE

In an ever changing environment like the University of Guelph, people should realize that jobs do not remain the same. Your duties and responsibilities may change over time. During the annual performance review, you should be discussing any “changes” within your job that have occurred during the past year or are anticipated in the very near future. Some changes may be minor or slight and would not warrant submission to the committee. At any point during the year, if a substantial change is made to your position, it would be appropriate to revise the job fact sheet (see C) and follow the procedure for reclassification. The performance appraisal period should be used to “audit” your job fact sheet, but does not preclude revision at any other appropriate point during the year.

An employee or a supervisor may initiate the reclassification process. However, you will require the support of your supervisor in order to have your Job Fact Sheet sent to the Joint Job Evaluation Committee. If you are of the opinion that your job fact sheet has significantly changed and you wish to initiate the reclassification process, please discuss this with your supervisor. If your supervisor initiates the process, they will discuss the changes with you.

If your supervisor does not agree and will not support a reclassification request, call your USW Local 4120 Representative or Executive to discuss the situation and any recourse available, up to and including filing a complaint as provided for under Article 8.04 of the Collective Agreement and Memorandum of Understanding #4.

Signing your Job Fact Sheet indicates that you have read and had an opportunity for input into the revised Job Fact Sheet. If you do not agree with the revised Job Fact Sheet, you are not obliged to sign it. However, you should discuss your concerns directly with your supervisor. If you cannot resolve your concerns at this level, you may contact your USW Local 4120 Representative, Executive, or Human Resources Service Coordinator, to discuss the situation and any recourse available.

Human Resources will forward to the USW Local 4120, in a timely manner, a copy of the date-stamped front page of job fact sheets submitted for evaluation.

-F-
(4) COMMITTEE CONSULTATION

The job fact sheet that is submitted to the Joint Job Evaluation Committee should be the result of discussions between you and your supervisor. You should always have a copy of your current job fact sheet for reference. Be sure to retain a copy of the final version before submitting it to the Committee. When a new job fact sheet is submitted for reclassification, the old job fact sheet will be submitted at the same time; both will go to the Job Evaluation Committee.

During the evaluation process, the Job Evaluation Committee may have specific questions regarding your job. Clarification may be sought through either follow-up questionnaires, telephone interview, or visiting the job site. At the direction of the Committee, the Job Evaluation Coordinator or the Chair of the Job Evaluation Committee may contact either the incumbent and/or the supervisor. At the discretion of the Job Evaluation Committee, members, (minimum one representative from each side), will have the option of going to the job site and consulting with personnel in the workplace to gain a better understanding of the nature of a job. If the job fact sheet is clear and complete, these follow up procedures may not be necessary. Either the incumbent in the position or the supervisor may be contacted. It is essential that any clarification that is provided by either the supervisor or the incumbent, is shared with the other person.

If the Job Evaluation Committee notices that there have been minor or no changes made in a job fact sheet, the Committee will not re-evaluate and will, instead, return it to Human Resources and to the incumbent/supervisor with an explanation.

(5) COMMUNICATION

It may be several months before your job is actually evaluated by the committee. Any reclassification will be retroactive to the date the request for reclassification was received in Human Resources.

The results of the joint evaluation will be forwarded to the supervisor, with a copy to the incumbent and USW Local 4120. If any additional information/clarification was obtained for the Evaluation Committee, this will be indicated in the same memo.
G. APPEALS

(1) Grounds for Appeal

An appeal may be considered after the decision of the Joint Job Evaluation Committee has been communicated to the employee and supervisor. An appeal will be considered if your Job Fact Sheet contains wrong information or is missing information or needs clarification. This should be done in consultation with your supervisor as this information may have already been communicated to the Joint Job Evaluation Committee. Supervisors may also appeal decisions of the Joint Job Evaluation Committee. If the Supervisor initiated the process they will discuss the appeal and provide you with a copy. The Committee will consider only those appeals where there is consensus by the supervisor and the incumbent about the job. If you and your Supervisor cannot agree on the additional job content for appeal purposes, please call your USW Local 4120 Representative to discuss the situation.

(2) Procedure

Your appeal submission should consist of the original Job Fact Sheet, plus the additional information and any supporting documents. The additional information should refer to the Job Fact Sheet. For example, “Activity ‘A’ should have included.....”, “Activity ‘B’ means I do......”, “The following missing information.....” etc.. Indicate which factors you feel were inappropriately rated and provide your reasons. Your appeal should be clearly and concisely written. Do not submit a new rewritten Job Fact Sheet.

Your appeal should be sent to the Job Evaluation Coordinator within ten (10) working days but not exceeding fifteen (15) working days of when you would have reasonably been expected to receive the decision of the Joint Job Evaluation Committee. You will also send a copy of your appeal to the USW Local 4120 and to your supervisor at the same time. Within ten (10) working days of when it can be reasonably expected that the supervisor has received the appeal, he/she must send comments on your appeal to the Job Evaluation Coordinator and to you.

Since appeals will be looked at by a larger Joint Job Evaluation Committee, it could take up to six months before a decision is communicated to you. However, Human Resources will confirm receipt of your appeal within ten (10) working days. The decisions made on appeals will be final and binding.

(3) Disputes

If your supervisor is not prepared to support your request for appeal, you may contact your USW Local 4120 Representative, Executive, or Human Resources Service Coordinator, to discuss the situation and any recourse available, up to and including filing a complaint as provided for under 8.04 of the Collective Agreement and Memorandum of Understanding #4.
(1) EXPLANATION OF BANDING

Several years ago, a commitment was made to discontinue the use of the old 54 classification-generic salary program for USW Local 4120 members. It was viewed to be out-dated, needlessly cumbersome and illegal for Pay Equity purposes.

In compliance with Ontario Pay Equity Legislation, the Joint Pay Equity Negotiating Committee agreed upon a Gender Neutral Evaluation Plan.

The plan was used by the Joint Job Evaluation Committee who were selected from the University and the USW Local 4120 as per the legislation. The committee’s evaluations were based upon 1989 Job Fact Sheets which required the signed approval from supervisors, chairs, deans or directors.

Point factor evaluations resulted in “bands” of jobs with similar values. Pay Equity rates were established for each band as required by legislation.

In order to maintain pay equity and to establish job equity within the bargaining unit, the new salary grid was negotiated and ratified by the parties in June, 1991.

Employees were notified of the bands in which their position fell and they were given an indication of the percentage of incumbents in their old classification that appeared in the new band or lower.
(2) SALARY GRID

United Steelworkers, Local 4120, (USW M.U.S.)

April 1, 1997

<table>
<thead>
<tr>
<th>BAND</th>
<th>Level 1 Minimum $</th>
<th>Level 2 $</th>
<th>Level 3 $</th>
<th>Level 4 $</th>
<th>Level 5 Job Rate $</th>
<th>Maximum $</th>
</tr>
</thead>
<tbody>
<tr>
<td>Band 1</td>
<td>10.75</td>
<td>11.29</td>
<td>12.00</td>
<td>12.73</td>
<td>13.43</td>
<td>16.12</td>
</tr>
<tr>
<td>Band 2</td>
<td>12.02</td>
<td>12.63</td>
<td>13.41</td>
<td>14.23</td>
<td>15.03</td>
<td>18.04</td>
</tr>
<tr>
<td>Band 3</td>
<td>13.30</td>
<td>13.96</td>
<td>14.86</td>
<td>15.75</td>
<td>16.62</td>
<td>19.96</td>
</tr>
<tr>
<td>Band 4</td>
<td>14.58</td>
<td>15.30</td>
<td>16.29</td>
<td>17.25</td>
<td>18.23</td>
<td>21.88</td>
</tr>
<tr>
<td>Band 5</td>
<td>15.86</td>
<td>16.67</td>
<td>17.72</td>
<td>18.78</td>
<td>19.83</td>
<td>23.79</td>
</tr>
<tr>
<td>Band 6</td>
<td>17.14</td>
<td>18.00</td>
<td>19.14</td>
<td>20.28</td>
<td>21.42</td>
<td>25.70</td>
</tr>
<tr>
<td>Band 7</td>
<td>18.41</td>
<td>19.34</td>
<td>20.56</td>
<td>21.79</td>
<td>23.02</td>
<td>27.62</td>
</tr>
<tr>
<td>Band 8</td>
<td>19.68</td>
<td>20.68</td>
<td>21.98</td>
<td>23.30</td>
<td>24.61</td>
<td>29.54</td>
</tr>
<tr>
<td>Band 9</td>
<td>20.97</td>
<td>22.02</td>
<td>23.41</td>
<td>24.82</td>
<td>26.22</td>
<td>31.45</td>
</tr>
</tbody>
</table>
Please read the instructions on the back page carefully, prior to completing the Job Fact Sheet.

When completed, submit the typed form, including all required signatures to: Human Resources Division.
Please retain two copies of the Job Fact Sheet; one for the employee and one to be kept on file in the department.

1. Position Identification - (Please Print)

Department & Position Number: ___________________________

Date: __/__/ YY MM DD

Department Name: ___________________________
College or Directorate: ___________________________

Employee Name: ___________________________
Position Title: ___________________________

Immediate Supervisor: ___________________________
Position Title: ___________________________

Room/Bldg. Location: ___________________________
Employee Group/Bargaining Unit: ___________________________

APPROVAL SIGNATURES

__________________________
Employee - (Signature)    Immediate Supervisor - (Signature)

__________________________
Chair or Department Head - (Please Print)    Dean or Director - (Please Print)

__________________________
Chair or Department Head - (Signature)    Dean or Director - (Signature)

Date Received in Human Resources: __/__/ YY MM DD

Date Position Evaluated: __/__/ YY MM DD
2. JOB DESCRIPTION

Consider the major activities or responsibilities you undertake (usually 3 to 6 of them). Describe each of them, by a phrase, at the top of each box. Estimate the percentage of time you spend on each. Then describe each. Then describe each activity using details or examples.

Activity A: * (*%)

Activity B: * (*%)

Activity C: * (*%)

Activity D: * (*%)

Activity E: * (*%)

3. EDUCATION AND SPECIFIC TRAINING

(a) What should be the minimum schooling or formal training for a new person being hired into this job?

[ ] Elementary School (up to gr. 8) [ ] Undergraduate Degree
[ ] Partial Secondary School (to Gr. 10) [ ] Master's Degree
[ ] Secondary School [ ] Ph.D
[ ] Community College (2 years) [ ] Other - *

(b) Is any Provincial or other vocational or professional certification or degree required?

(e.g. Registered Nurse, P.Eng., AHT, C.A., Ticketed Trade, etc.)

[ ] Mandatory [ ] Preferred
[ ] Specify

(c) What special skills or training are needed to perform job or operate equipment? (e.g. word processing, computer)
(d) Specify what equipment you operate on the job (e.g. floor polisher, photocopier, microscope, etc.)

4. RELEVANT EXPERIENCE

(a) How much elapsed "on-the-job" learning time would you estimate should be required for a new person with education as in #3 to achieve competence on this job? (Experience may be gained on this and/or preceding jobs; please complete attached appendix).

(b) Please elaborate on what type of experience must be obtained.

5. INITIATIVE (INDEPENDENCE OF ACTION)

(a) List 3 decisions you make or duties you perform without subsequent checks or reference to a supervisor.

1. *
2. *
3. *

(b) List 3 decisions on which you seek consultation with, or approval from a supervisor.

1. *
2. *
3. *

(c) What guidelines, procedures, manuals, etc. are available to guide your decision-making and actions?

(d) State any financial responsibilities (and amounts) your job involves, e.g. budget, sales, revenues, ordering of supplies.

6. IMPACT OF ERRORS

Describe examples of typical major errors that could reasonably occur in your major activities listed in #2, even with due care. Indicate the worst consequence, e.g. waste, delays, time lost, money lost, injury, damage, effect on people.
7. WORKING WITH OTHERS (Excluding those supervised - see 9)

With whom are you required to work in doing your job? Use titles. Indicate purpose of contact (e.g. counselling, providing or seeking information, conflict resolution, consultation). Indicate the frequency as daily (D), weekly (W), quarterly (Q), annually (A).

Within Organization (e.g. staff, faculty, students)

<table>
<thead>
<tr>
<th>Title of People Contacted</th>
<th>How Often</th>
<th>Purpose</th>
<th>How</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>D</td>
<td>W</td>
<td>M</td>
</tr>
</tbody>
</table>

Outside Organization (e.g. visitors, suppliers, government officials, other universities, parents, general-public)

<table>
<thead>
<tr>
<th>Title of People Contacted</th>
<th>How Often</th>
<th>Purpose</th>
<th>How</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>D</td>
<td>W</td>
<td>M</td>
</tr>
</tbody>
</table>

8. SUPERVISION OR DIRECTION EXERCISED

Indicate the type of supervision you exercise, if applicable. List what jobs or groups of staff you supervise.

(a) [ ] Assign and check work of others doing work similar to yours. *

(b) [ ] Provide technical or functional guidance to other staff, graduate students. *

(c) [ ] Supervise a work group; assign work to be done, methods to be used, and take responsibility for all the work of the group. *

(d) [ ] Manage the work, practices and procedures of a unit. Responsible for appraisal, discipline, hiring and replacement of personnel. *

(e) [ ] Other (Specify) *

9. EMPLOYEES SUPERVISED

Enter in appropriate box the total actual number of staff for whose work you are fully accountable. (Complete this section only if 8(c) and (d) are also completed).

Full-time Employees

| 1-3 | 4-10 | 11-20 | 21-30 | 31-60 | 61-150 | 151 Plus |

Part-time Employees

| 1-3 | 4-10 | 11-20 | 21-30 | 31-60 | 61-150 | 151 Plus |

Full-time Equivalent:
Combined Total:
10. PHYSICAL, MENTAL AND VISUAL DEMANDS

Indicate the proportion of your work day that you are involved with these conditions. (This does not need to add up to 100%)

<table>
<thead>
<tr>
<th>DEMANDS</th>
<th>DURATION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Occasional (up to 30%)</td>
</tr>
<tr>
<td>Minimal Exertion - variety of sitting, standing, walking</td>
<td></td>
</tr>
<tr>
<td>Moderate Exertion - some climbing, extensive walking</td>
<td></td>
</tr>
<tr>
<td>Heavy Exertion - constant standing and/or walking</td>
<td></td>
</tr>
<tr>
<td>Lifting *</td>
<td></td>
</tr>
<tr>
<td>Weight range:</td>
<td></td>
</tr>
<tr>
<td>[ ] under 10 lbs.</td>
<td></td>
</tr>
<tr>
<td>[ ] 10-20 lbs.</td>
<td></td>
</tr>
<tr>
<td>[ ] 20-40 lbs.</td>
<td></td>
</tr>
<tr>
<td>[ ] 40-60 lbs.</td>
<td></td>
</tr>
<tr>
<td>[ ] over 60 lbs.</td>
<td></td>
</tr>
<tr>
<td>Heavy physical effort (other than lifting)</td>
<td>Specify *</td>
</tr>
<tr>
<td>Intense visual concentration</td>
<td>Specify *</td>
</tr>
<tr>
<td>Intense listening concentration</td>
<td>Specify *</td>
</tr>
<tr>
<td>Intense mental concentration</td>
<td>Specify *</td>
</tr>
<tr>
<td>Other:</td>
<td>Specify *</td>
</tr>
</tbody>
</table>

11. WORKING CONDITIONS

(a) Explain any unpleasant aspects directly related to your job, (e.g. heat, cold, odours, noise, outside work in adverse conditions, infection, and other dangers and hazards.)

Minor disadvantages:  *

Major Unpleasant aspects:  *

(b) What is your scheduled work week?  *

What, if any, shift work do you have?  *

Other unusual hours? On call?  *

(c) Overnight travel: % of time away?  *

Driving vehicle during work: % of time?  *
APPENDIX TO THE JOB FACT SHEET

RELEVANT EXPERIENCE - CALCULATION TABLE

<table>
<thead>
<tr>
<th>REQUIRED PREVIOUS RELATED JOB EXPERIENCE</th>
<th>TIME ON THE JOB TO BE COMPETENT FOR AVERAGE INCUMBENT</th>
<th>TOTAL RELEVANT EXPERIENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>(ie. experience gained in previous positions here or off-campus)</td>
<td>(ie. training to learn new duties after education)</td>
<td>(for entry on Job Fact Sheet Section 4)</td>
</tr>
</tbody>
</table>

Please attach to completed Job Fact Sheet
(2) GLOSSARY OF TERMS

1. Acts Performs in substitute capacity for; as in assuming the responsibility and authority of a supervisor in his/her absence.

2. Accumulates Gathers up; collects; increases gradually in quantity or number.

3. Administers Manages or directs the application or execution of.

4. Advises Recommends a course of action (not simply tell or inform).

5. Analyses Studies the factors of a situation or problem in order to determine solutions or outcomes. Studies various unrelated facts to arrive at a conclusion and recommends or initiates a course of action.

6. Approves Sanctions officially; accepts as satisfactory; ratifies (thereby assuming responsibility for). Used only in the situation where an individual has final authority.

7. Arranges Prepares; puts in proper order; plans.

8. Assigns Appoints; prescribes a course of action; specifies, selects or designates; e.g. allocates responsibilities to subordinate personnel.

9. Assists Lends aid; helps; gives support to.

10. Audits Assures adherence to standard practices such as checking the accuracy of accounting records.

11. Authorizes Empowers; permits; establishes by authority.

12. Compiles Collects into proper or designated form, e.g. compiles data into a report. Composes reports using materials from several other documents, such as summary reports and statistical summaries.

13. Controls Checks or regulates; keeps within limits; exercises directing, guiding or restraining power over; e.g. directs site deployment of materials and equipment.

14. Cooperates Acts or operates jointly with others (to collaborate).
15. Coordinates  Brings into common action with others, as in coordinating staff functions to obtain a result that requires action on the part of several staff sections; produces a smooth operation; as, to coordinate the work of keypunching and tabulating to meet production schedule deadlines. When the term coordinate is used, it must be followed by the activities or elements being coordinated.

16. Decides  Dictates a solution that ends uncertainty or dispute; makes a choice or judgment.

17. Delegates  Entrusts to the care or management of another.

18. Determines  Fixes conclusively or authoritatively.

19. Develops  Evolves; makes apparent; brings to light; makes more available or usable.

20. Directs  Regulates the activities or course of; governs or controls, gives guidance to.

21. Distributes  Divides among several or many; spreads out; gives out to members of a group.

22. Establishes  Makes firm; sets on a firm basis, as in establishing specific procedures to be followed; sets up as an order of precedent.

23. Examines  Investigates; scrutinizes; inspects or tests.

24. Executes  Gives effect; follows through to the end; completes.

25. Expedites  Hastens the movement or progress of; removes obstacles; accelerates.

26. Formulates  Puts into a systemized statement; develops or devises a plan, policy or procedure.

27. Functional Guidance  An employee with the following duties and responsibilities is providing guidance:
(a) regularly performs bargaining unit work;
(b) provides guidance and direction and maintains standards of productivity for other employees without actually assuming the role of supervisor as defined under the Labour Relations Act;
(c) may schedule and assign work and keep records as required;
(d) is familiar with the requirements of the operation.

28. Gathers  Collects; brings together; picks up.

29. Implements  Carries out; performs acts essential to the execution of a plan or program; gives effect to.

30. Initiates  Originates; begins; introduces for the first time, as a plan, policy or procedure.
31. Instructs  Imparts knowledge; informs; furnishes with directions; directs or commands; trains
   (a) Definite Instructions - Precise in detail, explicit, limited in determining the course to follow;
   (b) General Instructions - Not precise, detailed, or specific.

32. Interprets  Explains the meaning of; translates; elucidates.

33. Interviews  Meets with personally; consults formally with; usually implies questioning or obtaining information, as interviews applicants to determine qualifications.

34. Issues  Publishes; officially gives out; makes available.

35. Maintains  Keeps in existing state.

36. Manages  Controls; directs; conducts; guides, administers. Plans, organizes staff, directs and controls efforts of subordinate organizational units through intermediate levels of management or supervision.

37. Monitors  Watches; observes; checks; keeps track of.

38. Operates  Conducts; directs; runs, as in machinery or equipment.

39. Organizes  Arranges; systematizes persons or things into proper places, especially in relation to each other gives structure to; puts in proper order.

40. Participates  Takes part in.

41. Performs  Carries on to a finish; accomplishes; executes.

42. Plans  Devises a method or course of action; represents as by a diagram; prearranges the details of, as to plan a campaign; intends, proposes to do; as in plans daily work assignment.

43. Prepares  Makes ready; plans in advance.

44. Processes  Conducts a series of actions leading to a result.

45. Receives  Accepts; takes, as in orders, mail, etc.; admits visitors in a specified manner.

46. Recommends  Suggests courses of action or procedures to another person who has the primary responsibility for adopting and carrying out those actions or procedures recommended. The actions or procedures are studies by the person receiving the recommendations, who then decides what course should be taken.
47. Reports  
Gives an account of; relates; tells; repeats; prepares an account of, orally or in writing; presents conclusions reached; makes, issues or submits formal report; presents oneself, as reports for duty.

48. Requisitions  
Makes a formal request, application or written order, as for equipment, tools, paper, food, supplies, etc.

49. Researches  
Conducts investigation or experimentation aimed at the discovery and interpretation of facts; revision of accepted theories or laws, in the light of new facts or practical application of such new or revised theories or laws.

50. Resolves  
Determines; decides; settles; solves; implies position and authority for making a decision.

51. Responsibility  
Accountable for own decisions

(1) Complete Responsibility  
Individual has complete authority to take whatever action she/he deems advisable or necessary within clearly defined limits. May initiate and carry out the action but is required to advise the supervisor of the action taken (after the fact). Must inform the supervisor of non-routine situations.

(2) Delegated Responsibility  
Individual has the authority to take whatever action she/he deems advisable or necessary within clearly defined limits. May initiate and carry out the action but is required to advise the supervisor of the action taken (after the fact). Must inform the supervisor of non-routine situations.

(3) General Responsibility  
The individual is required to gain the approval of his/her supervisor before proceeding with the action which he/she deems necessary or advisable.

52. Reviews  
Goes over or examines deliberately or critically, usually with a view to approval or dissent. Analyses results for the purpose of giving an opinion.

53. Schedules  
Plans a timetable; sets specific times for events.

54. Submits  
Presents for review, consideration, decision.

55. Supervisory  
A Supervisor has effective control over the working relationship of the employee. This includes the responsibility and authority to change or alter the employee’s employment status. In some cases they do not make a final decision but their recommendations are almost always followed. Changes in employment status normally include hiring, termination, discipline, performance review, merit and salary increases, vacation scheduling, authorization of overtime, changes in the nature of the work or the job description, absentee control, training and orientation.
of employees, and safety. Evidence of these duties actually having been performed must be available; it is not enough to simply say that an individual does them.

56. Supplies Provides, makes available.

57. Trains Increases skill or knowledge by capable instruction, usually in relation to a pre-determined standard.

58. Verifies Proves; confirms; substantiates; authenticates; checks or tests the accuracy or exactness of, as in verifies by comparing payroll to draft payroll.
MEMORANDUM

TO: Job Evaluation Coordinator  
Compensation and Benefits

FROM: ____________________________

RE: EMPLOYEE REQUEST FOR APPEAL

DEPARTMENT: ________________________  POSITION NO: ________________________

NAME OF DEPARTMENT: ____________________________

INCUMBENT’S NAME: ____________________________

IMMEDIATE SUPERVISOR: ____________________________

CHAIR OR DEPARTMENT HEAD: ____________________________

DEAN/DIRECTOR: ____________________________

I WISH TO APPEAL THE EVALUATION OF MY JOB BASED ON THE INFORMATION CONTAINED IN THE MOST RECENT JOB FACT SHEET AND I HAVE PROVIDED ADDITIONAL INFORMATION AS ATTACHED.

INCUMBENT’S SIGNATURE: ____________________________

Incumbent must send copies to: Immediate Supervisor  
Chair or Department Head  
USW Local 4120

NB: Guidance This Appeal process applies to jobs that have been evaluated by the Joint Job Evaluation Committee.

NOTE TO SUPERVISOR:
You are required to acknowledge and respond to this appeal. If no comments are received from you regarding this appeal within 10 working days, we will assume you are in agreement with the additional information.