



JOB EVALUATION PLAN RATING MANUAL

between

SCHOOL DISTRICT NO. 85 (VANCOUVER ISLAND NORTH)

and

THE CANADIAN UNION OF PUBLIC EMPLOYEES

LOCAL 401

Revised June 2016

TABLE OF CONTENTS

| | |
|--|-----------|
| GUIDELINES FOR RATERS | 3 |
| SUB-FACTOR 1 - EDUCATION | 4 |
| SUB-FACTOR 2 - EXPERIENCE | 5 |
| SUB-FACTOR 3 - JUDGEMENT | 6 |
| SUB-FACTOR 4 - MENTAL EFFORT | 7 |
| SUB-FACTOR 5 - PHYSICAL ACTIVITY | 8 |
| SUB-FACTOR 6 - DEXTERITY | 9 |
| SUB-FACTOR 7 - ACCOUNTABILITY | 10 |
| SUB-FACTOR 8 - SAFETY OF OTHERS | 11 |
| SUB-FACTOR 9 - CONTACTS | 12 |
| SUB-FACTOR 10 - DISAGREEABLE CONDITIONS | 14 |

GUIDELINES TO RATERS

In order to fully understand how to properly apply this plan, the rater must be fully familiar with the following:

- Notes to raters and subfactor definitions.
- Guarding against bias in job evaluation.
- Maintenance Manual.
- Equal Pay for Work of Equal Value principles.

Each of the factors has defined levels and associated point values. In considering these factors, it is essential that the rater evaluate the job and not the individual person. The purpose of this job evaluation plan is to evaluate the job content and not volume of work or how well the person is performing on the job.

Each job is analyzed and allocated a degree value for every subfactor. Each degree within a subfactor has a weighted point value as follows:

| SUBFACTORS | | | | | | | | | | |
|-----------------------------------|-----------|------------|-----------|---------------|-------------------|-----------|----------------|------------------|-----------|-------------------------|
| | Education | Experience | Judgement | Mental Effort | Physical Activity | Dexterity | Accountability | Safety of Others | Contacts | Disagreeable Conditions |
| Weighted Points per Degree | 16 | 12 | 10 | 10 | 5 | 5 | 12 | 10 | 11 | 9 |
| Degrees | | | | | | | | | | |
| Total Points | | | | | | | | | | |

FACTOR SKILL

Subfactor 1 – Education

Definition:

This subfactor measures the general knowledge and specialized or vocational training necessary to perform the job duties in a satisfactory manner and has no relationship to the academic achievement of an employee. The degree levels are normally expressed in terms of formal education or equivalent. Similar levels of achievement can be obtained through related experience, courses or self-improvement.

Degrees:

1. High School Grade 12 graduation or equivalent.
2. High School Grade 12 graduation plus an additional program of up to 3 months or equivalent.
3. High School Grade 12 graduation plus an additional program of up to 6 months or equivalent.
4. High School Grade 12 graduation plus an additional program of up to one year or equivalent.
5. High School Grade 12 graduation plus an additional program of over one and up to two years or equivalent.
6. High School Grade 12 graduation plus an additional program of over two and up to three years or equivalent.
7. Undergraduate level - High School Grade 12 graduation plus an additional program over three and up to four years or equivalent.
8. Degree level – Post-Secondary Degree of five years or equivalent.
9. Master’s Degree level – Master’s Degree of six years or equivalent.

Notes to Raters

1. *Use today’s educational levels and standards. It is the level of knowledge normally required using “today’s” standards which must be measured, not the educational background of the incumbent.*
2. *When rating the education subfactor, reference should be made to the experience subfactor.*
3. *Additional training/courses required to perform the duties of the job should be considered in this subfactor.*
4. *The degree level bears no relation whatsoever to the hiring practice of the organization.*

FACTOR SKILL

Subfactor 2 – Experience

Definition:

This subfactor should be considered when the degree of education is established. It serves as a scale of measurement for the amount of practical experience that an average individual having the appropriate theoretical knowledge, specific education and specialized training, would require to perform the job duties in a satisfactory manner. It includes the sum of (a) and (b).

- a) Experience in any related work or work in lesser positions and other relevant work and life experiences (e.g. homemaking, child rearing) which is necessary for the performance of the job.
- b) The period of training and adjustment on the job itself.

Degrees:

- 1. Up to and including 3 months.
- 2. Over 3 months, up to and including 6 months.
- 3. Over 6 months, up to and including one year.
- 4. Over one year, up to and including two years.
- 5. Over two years, up to and including three years.
- 6. Over three years, up to and including four years.
- 7. Over four years, up to and including five years.
- 8. Over five years.

Notes to Raters

- 1. *Experience covers the time required to learn the practical application of theoretical knowledge to work problems, and to learn the necessary techniques, methods, practices, procedures, use of forms, routines, etc.*
- 2. *When rating the education subfactor, no consideration is given to the maturing of the individual.*
- 3. *It includes the years spent in an apprenticeship or similar training program excluding formal classroom time.*
- 4. *Field time required for membership in a professional organization, designation, or requirements for a licence should be considered under this subfactor.*
- 5. *This subfactor does not measure the actual experience of the incumbent(s) and bears no relation whatsoever to the hiring practice of the organization.*

FACTOR SKILL

Subfactor 3 – Judgement

Definition:

This subfactor measures the choice of action required in applying methods, procedures, or policies to complete the tasks.

Degrees:

1. The job requires the use of established guidelines that are well defined or detailed. There is little or no choice of action.
2. The job requires the application of established methods or procedures. Work may involve a choice of methods or procedures.
3. The job requires adapting established methods or procedures. Work involves a choice of methods or procedures.
4. The job requires that changes be recommended to established methods or procedures. Work involves a choice of methods or procedures or sequence of operation.
5. The job requires the development of procedures.
6. The job requires that changes be recommended to established policies.

Notes to Raters

This subfactor deals with the range of choice of action which is within the scope of the job duties, and does not deal with the responsibility for decisions which is dealt with under the "Accountability" subfactor.

FACTOR EFFORT

Subfactor 4 – Mental Effort

Definition:

This subfactor measures the period of time wherein above average mental and/or aural attentiveness is required on the job. Both the frequency and duration of the effort are to be considered.

Degrees:

1. Occasional periods of short duration.
2. Frequent periods of short duration or occasional periods of intermediate duration.
3. Continuous periods of short duration or frequent periods of intermediate duration or occasional periods of long duration.
4. Frequent periods of long duration or continuous periods of intermediate duration.
5. Continuous periods of long duration.

Notes to Raters

1. *Duration of time is interpreted as follows:*

| | |
|---------------------|---|
| <i>Short</i> | <i>Up to and including one hour</i> |
| <i>Intermediate</i> | <i>Over one hour, and up to and including two hours</i> |
| <i>Long</i> | <i>In excess of two hours</i> |

2. *Frequency relates to work carried out on a regular basis throughout the year and is interpreted as follows:*

| | |
|-------------------|---|
| <i>Occasional</i> | <i>Once in a while most days</i> |
| <i>Frequent</i> | <i>Several times a day or at least four days per week</i> |
| <i>Continuous</i> | <i>Almost all working hours (except coffee and meal breaks) for at least an average of four days per week</i> |

FACTOR EFFORT

Subfactor 5 – Physical Activity

Definition:

This subfactor measures the physical activity by the type and duration required to perform the duties.

Degrees:

1. Light activity of short duration.
2. Medium activity of short duration or light activity of intermediate duration.
3. Heavy activity of short duration or medium activity of intermediate duration or light activity of long duration.
4. Heavy activity of intermediate duration or medium activity of long duration.
5. Heavy activity of long duration.

Notes to Raters

1. *Duration of time is interpreted as follows:*

| | |
|---------------------|---|
| <i>Short</i> | <i>Up to and including one hour</i> |
| <i>Intermediate</i> | <i>Over one hour, and up to and including two hours</i> |
| <i>Long</i> | <i>In excess of two hours</i> |

2. *Type of activity relates to work carried out on a regular basis throughout the year and is interpreted as follows:*

| | |
|---------------|--|
| <i>Light</i> | <i>Sitting, driving, walking on even surfaces, lifting weights not exceeding 5 kg.</i> |
| <i>Medium</i> | <i>Standing, climbing stairs, walking on uneven surfaces, lifting weights not exceeding 10 kg.</i> |
| <i>Heavy</i> | <i>Stooping, kneeling, crouching, lifting weights exceeding 10 kg.</i> |

3. *Consider restriction of movement in this subfactor.*

FACTOR EFFORT

Subfactor 6 – Dexterity

Definition:

This subfactor measures the level of dexterity required by a job. The levels of manual dexterity are determined by considering the elements of speed and/or accurate hand/eye (or hand/foot) coordination. Movements can be either fine or gross.

Degrees:

1. Employee is required to perform tasks that demand minimal accurate coordination of fine or gross movements. The required manual tasks are such that above average speed is not required.
2. Employee is required to perform tasks that demand the accurate coordination of fine or gross movements, where speed is a secondary consideration.
3. Employee is required to perform tasks that demand the accurate coordination of fine or gross movements, where speed is a major consideration.

Notes to Raters

1. *Examples of coarse movements are: using long handled tools such as mops and shovels, floor polishers, lawn mowers, etc.; stocking shelves, etc.*
2. *Examples of fine movements are: keyboard skills, arc welding, giving injections, drafting, repairing equipment, etc.*

FACTOR RESPONSIBILITY

Subfactor 7 – Accountability

Definition:

This subfactor measures the effect of actions on others and covers the relationship between the nature of work, the potential for loss of time and resources and the effect of the work.

Degrees:

1. Actions would have little or no effect.
2. Actions could result in a minor loss of time or resources.
3. Actions could result in a significant loss of time or resources, or cause some embarrassment within the department or organization.
4. Actions could result in a serious loss of time or resources, or cause significant embarrassment within the organization and have limited impact on its public image.
5. Actions could result in a major loss of time or resources, or cause severe embarrassment within the organization and have serious impact on its public image.

Notes to Raters

1. *The rating manual does not include a separate subfactor for the supervision of other employees so those types of duties must be considered in this subfactor.*
2. *Consider the nature of the more serious errors of the job (regardless of the type or cause), at what stage errors would be detected and their effect.*
3. *Errors may be mechanical or errors in judgement.*
4. *Consider accountability in terms such as:*
 - *handling money*
 - *damage or loss involving equipment, supplies or property*
 - *safeguarding of restricted information*
 - *the seriousness of an error*
 - *length of time to correct an error*
 - *embarrassment to the department or organization*

FACTOR RESPONSIBILITY

Subfactor 8 – Safety of Others

Definition:

This subfactor measures the degree of care required to prevent injury to others.

Degrees:

1. Basic degree of care required to prevent injury or harm to others.
2. Some degree of care required to prevent injury or harm to others.
3. Considerable degree of care required to prevent injury or harm to others.
4. High degree of care required to prevent injury or harm to others.

Notes to Raters

This subfactor is not to be seen as conflicting with any and all Health and Safety Regulations in the workplace, nor is it an evaluation of such regulations. It is recognized that all incumbents have a self-disciplined responsibility to their fellow workers' welfare. However, some jobs and their locations have more potential hazards than others and it is in this context that the relative differences of "basic", "some", "considerable" and "high" are used.

Degree of care is interpreted as follows:

| | |
|---------------------|---|
| <i>Basic</i> | <i>Most office workers</i> |
| <i>Some</i> | <i>Workers assisting students etc.</i> |
| <i>Considerable</i> | <i>Workers with fragile students, operators of light equipment etc.</i> |
| <i>High</i> | <i>Operators of heavy equipment, buses etc.</i> |

FACTOR RESPONSIBILITY

Subfactor 9 – Contacts

Definition:

This subfactor measures the contacts necessary in communicating with others, be they co-workers, members of the public or students. These communications may be in writing, or oral, including sign language, and carry varying degrees of responsibility for the handling of contacts tactfully and harmoniously.

Degrees:

1. Courtesy and tact required in obtaining and/or handing out data or information.
2. Courtesy and tact required in explaining, exchanging data or information.
3. Tact and discretion required to deal with or settle requests, complaints or clarification of information.
4. Tact and diplomacy are required when handling contacts of a difficult or specialized nature, for the discussion and resolution of problems by presenting or obtaining detailed information.
5. Tact, diplomacy and human relations skills are required for frequent contacts of a difficult, specialized or sensitive nature, for such purposes as influencing, persuading, securing the co-operation of others.
6. Contacts are a major element of the job requiring considerable communication and human relations skills for such purposes as influencing, persuading, motivating or negotiating with others, and in dealing with highly sensitive issues.

Notes to Raters

1. *It is important to analyze the purpose of the contact in conjunction with the nature of the contact. The level of the person contacted is relevant to the extent that it serves as a 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).*
2. *Contacts of a “difficult 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.*
3. *Communication skills include such skills as oral presentation skills, writing skills (reports, correspondence), listening skills and observation skills.*

4. *Human relations skills include such skills as empathy, sensitivity, understanding of human and organizational behaviour, motivational techniques and counseling skills.*

FACTOR WORKING CONDITIONS

Subfactor 10 – Disagreeable Conditions

Definition:

This subfactor measures the type and frequency of disagreeable conditions under which an employee is required to carry out the job duties.

Degrees:

1. Minor conditions with little exposure.
2. Major conditions with little exposure or minor conditions with occasional exposure.
3. Major conditions with occasional exposure or minor conditions with frequent exposure.
4. Major conditions with frequent exposure or minor conditions with continuous exposure.
5. Major conditions with continuous exposure.

Notes to Raters

1. *Raters should consider the many and varied conditions that prevail in the workplace. The types of disagreeable conditions are as follows:*

| | |
|--------------|--|
| <i>Minor</i> | <i>(a) Minor conditions of dust, dirt, fumes, heat, cold, noxious odours. Noise, vibration, poor lighting, inclement weather, poor ventilation, congested workplace, lack of privacy, travel, radiation from equipment, interruptions.</i> |
| | <i>(b) Minor health hazards, such as exposure to infectious disease, and accident hazards, including the possibility of lost time accidents.</i> |
| <i>Major</i> | <i>(a) Extreme conditions of dust, dirt, fumes, heat, cold, noxious odours. Noise, vibration, poor lighting, inclement weather, poor ventilation, congested workplace, lack of privacy, travel, radiation from equipment, interruptions.</i> |
| | <i>(b) Exposure to verbal and physical abuse, and behaviourally difficult students, members of the public etc.</i> |
| | <i>(c) Serious health hazards, such as exposure to infectious disease, and accident hazards of a serious nature involving lost time or which may result in partial or permanent disability.</i> |

2. *Raters should not consider conditions which are recognized and provided for under the terms of the Collective Agreement (e.g. shift work).*
3. *The frequency of exposure to disagreeable working conditions must be related to work carried out on a regular basis throughout the year as follows:*

| | |
|-------------------|---|
| <i>Little</i> | <i>Once in a while</i> |
| <i>Occasional</i> | <i>Once in a while most days</i> |
| <i>Frequent</i> | <i>Several times a day or at least four days per week</i> |
| <i>Continuous</i> | <i>Almost all working hours (except coffee and meal breaks) for at least an average of four days per week</i> |