Support Staff

Job Evaluation
Manual

Issued by: Joint Classification Committee
May 2009

Revision Checklist

Section/Factor	Page	Issue Date	Explanation
Guiding/Advising Others	20	February 2008	expanded definition of "others" to include "clients"
Guiding/Advising Others	21	February 2008	expanded definition of "others" to include "clients"
Education (1B)	10	October 2008	clarification in Note to Raters
Planning/Coordinating	16	October 2008	Notes to Raters - point 3, Level 3 - typos corrected
Education (1A)	8	May 2009	Notes to Raters - definition provided for "plus professional designation" in Levels 5 and 6

Table of Contents

Page

Introduction

This manual describes the "Job Evaluation System" that has been agreed to by the College Compensation and Appointments Council (Council) and the Ontario Public Service Employees Union (Union) to evaluate Support Staff positions in the college system.

Definition: CAAT Support Staff Positions

This plan covers all positions, excluding Appendix G - Summer Student Workers, in the Colleges of Applied Arts and Technology (CAAT) which are held by individuals covered by the terms and conditions of the Support Staff Collective Agreement between the Council and the Union.

Job Evaluation Guidelines

Job evaluation is the process of systematically analyzing the duties and responsibilities of a position and the skills required to perform the duties in order to determine its relative value to an organization. After evaluating a position, a payband can be assigned that is internally equitable with other Support Staff positions in the college system.

Job evaluation is concerned with the content of a position and not with the assessment of an individual's performance.

Position descriptions must be kept current and consistent job evaluation procedures must be followed. The section entitled "How to Use the Manual" outlines the guidelines that must be followed in evaluating positions.

Position Description Form

In order to evaluate a position it is necessary to have a completed Position Description Form (PDF). An example of the form that should be used is included in the appendices.

The PDF is intended to reflect the assigned duties and responsibilities of the position. It is not intended to represent a detailed working procedure nor a list of miscellaneous duties that are infrequently assigned to the position.

The College structures the position and the associated duties and responsibilities by:

- identifying and defining the tasks to be performed.
- assigning the level of responsibility to the position ensuring there is no duplication in accountability results.
- determining the qualifications and skills needed to do the job.

Purpose of the Position Description Form

The PDF provides a clear statement of the duties assigned by the College. It provides valuable source data for the following activities:

- classifying the position within the organizational structure;
- recruitment and selection processes;
- performance appraisal;
- other processes such as training, professional development and employee relations.

Important Points to Consider

1. Ensure that there is a PDF for each Support Staff position at the College. If multiple incumbents are performing the same duties then the PDF applies to all incumbents and each incumbent must receive a copy. PDFs should be updated at regular intervals and at least once every two years.

2. A PDF describes the position as it now exists, not as it ought to be or will be in the future.

3. Language should be specific and precise using simple factual statements which will leave no doubt in the mind of the reader about the skills needed to perform the job functions and how tasks are done.

4. The PDF should provide sufficient detail to disclose the scope of the job, such as:
    - use of specialized skills, such as project management;
    - education and experience that are necessary to fulfil the requirement of the position;
    - assigned responsibility to guide/advise others;
    - level of demands on physical and/or audio/visual effort;
    - level of responsibility and the type of supervision and technical support received;
    - working conditions in terms of the physical environment while doing the work, etc.

5. Some job functions have peaks and valleys. Percentages of time should reflect an estimate of the time spent on an annual basis. For example, over the course of a year, 90% of the time may be spent on a given job function during a specific period of time, while at other times the activity may diminish to 8 - 10%. When smoothing this out over the period of a year, this job function may be recorded as 40% on the PDF. Identifying the particular time frames of these peaks and valleys may be helpful in assisting raters understand the scope of the job functions.

6. The orientation process for each new employee should provide them with an opportunity to review, understand and sign the PDF.

7. Each employee should have a **current** signed PDF, and a copy must be retained on file in the Human Resources Department.

Job Evaluation System

Introduction

This section describes the point rating system that will be used to evaluate Support Staff positions. It is composed of eleven (11) factors that have been designed to capture the elements of skill, responsibility, effort and working conditions. Each factor consists of a factor definition, a description of the various levels in the factor, the assigned point values and notes to raters.

Point rating is an analytical, quantitative method of determining the relative value of positions. It is particularly suited to positions that consist of varied combinations of tasks. Essentially, point rating systems define characteristics (eg. factors) common to the positions being evaluated. Each factor contains a number of levels and each level has been assigned a specific number of points. The total value determined for each position is the sum of the point values assigned to each factor by the raters.

Job Evaluation Factors

The factors used in this job evaluation system meet five criteria:

1. They are present in all positions to some degree.

2. Significant differences in the levels of each factor can be defined and distinguished in positions.

3. They are useful in differentiating between positions.

4. They are important in determining the relative worth of positions for compensation purposes.

5. They comply with the Pay Equity Act.

The combined factors are not intended to describe every aspect of a position. They deal only with those characteristics which are useful in differentiating or determining a position's relative value within a College.

Selected Factors and their Associated Point Values and Weighting

There are eleven (11) factors in this point rating system.

The maximum point value determined for each factor reflects its relative importance. The various levels in each of the factors have been defined and appropriate point values have been assigned. The minimum point value for each factor is approximately one-tenth of the

maximum value of the factor. Also, each factor has been assigned an overall "weight" based on its relative importance in comparison to other factors.

The weighting and range of point value for each factor are as follows:

Factor	Weighting %	Minimum Points	Maximum Points
1A. Education	8.6	9	86
1B. Additional Education	3.0	3	30
2. Experience	8.6	9	86
3. Analysis and Problem Solving	14.2	14	142
4. Planning/Coordinating	8.0	8	80
5. Guiding/Advising Others	5.3	5	53
6. Independence of Action	14.2	14	142
7. Service Delivery	7.3	7	73
8. Communication	14.2	14	142
9. Physical Effort	4.7	5	47
10. Audio/Visual Effort	5.0	5	50
11. Working Environment	6.9	7	69
Total	100%	100	1000

How to Use the Manual

The steps outlined below must be followed in order to evaluate a position:

1.   Review the PDF in its entirety to gain an understanding of the position as a whole and of each factor used to describe the position.

2.   Compare the factor level definitions to the description in the PDF that has been written for that specific factor.

3.   Read the first factor level definition **in its entirety**. Continue to the next level until you find a factor definition that appears to capture the elements in the PDF. It is good practice to then read the next higher level and assess whether it also captures the information in the PDF. If the previous level appears to be the "best fit", then that is the level that should be selected. Do not select a factor definition based on a single word or phrase. The entire definition needs to be assessed to ensure that it appropriately fits the description contained within the PDF.

4a)   It is important to determine whether the example provided in the PDF reflects a core or significant skill, responsibility or activity. Also a determination must be made whether the skill, responsibility or activity is "**regular & recurring**" or "**occasional**".

"**Regular & recurring**" may not be readily identified as a quantitative amount of time. If a specific task occurs daily or weekly, it is easily identifiable as "regular & recurring". However, a specific task that occurs once or twice a year, every year, and takes up about 25% of the work year should also be recognized as "regular & recurring". Any task or responsibility that is an integral part of the position's work and is expected or consistently relied on should be considered "regular & recurring".

The term "**occasional**" can be considered in a few different time frames. It can be defined as once or twice a month or three or four times per year. It is important to remember that this term is to be considered when identifying **significant** skills or responsibilities associated with activities that occur for a short period of time, on a few occasions or sporadically throughout the year.

Ultimately, the primary focus is to determine whether the skill, responsibility or activity is of note and as such needs to be reflected in the evaluation. For example, if a description or example in the PDF applies to a skill that is used 5% of the time and is deemed to be a notable element of the position, it should be captured at the "occasional" level. However, if a skill is used about 5% of the time and it is not a significant differentiating element, it would not be helpful to assign the "occasional" level to the work being described.

No matter how often the activity occurs, however, the skill or responsibility must be important and without it the position duties could not be performed.

4b)   If the factor has both a "regular & recurring" and "occasional" component to it, you first select the appropriate factor level for "regular & recurring". The next step is to identify

whether the "occasional" element that has been listed in the PDF, should be recognized. If it is noteworthy, you will then determine the factor level that best describes the "occasional" element. If the selected factor level for "occasional" is at a higher factor level than the level assigned to "regular & recurring", record the points in the appropriate column. Otherwise, the "occasional" element and associated points are ignored.

For example, under the factor "Analysis and Problem Solving", if level 3 is selected as the "regular & recurring" requirement of the position and there is no significant skill level needing to be recognized occasionally, then 78 points would be recorded. If, at times level 4 is required and this requirement is considered as a significant and differentiating element of the job, then record 78 points for level 3 ("regular & recurring") and 9 points for level 4 ("occasional") for a total of 87 points. It would be unusual for the "occasional" element to be more than one level higher than the level identified as "regular & recurring".

Providing additional points at the "occasional" level permits the recognition of specific elements of work that should be noted but are not captured in the progression from one level to the next in the "regular & recurring" component of the work. You will notice that the same number of points have been assigned to each "occasional" level. Consequently, skills and responsibilities required occasionally cannot cause an increase to the factor level points so that they are equal to or greater than the points for the next factor level under "regular & recurring". This allows for individuals who occasionally perform duties at any of the higher levels to be recognized equally regardless of the "occasional" level assigned.

5. The "Notes to Raters" and "Definitions", which have been provided for each factor, **must** be followed. These provide directions for interpreting the factor and the levels within and clarifying the intent of the factor. They also provide raters with appropriate directions for interpreting the information in the PDF.

6. Record the factor level and the points assigned to it. A sample "Job Evaluation Form" is contained in the appendices.

7. Proceed to the next factor until all 11 factors have been reviewed using the steps outlined above.

8. When all factors have been evaluated, the point values in the columns for "regular & recurring" and "occasional" are added together to determine the total point rating for the position.

9. For internal consistency purposes, the College should compare the total point score for the position to other evaluated positions for interpretation of the factors.

10. Determine the appropriate payband by referencing the "Payband Determination Schedule", contained in the Manual, which outlines the range of total points that have been established for each of the paybands.

Notes to Raters

It is extremely important that the factors be clearly understood and interpreted in a consistent manner. Therefore, Notes to Raters have been provided to give raters guidance and direction in understanding and interpreting the factors.

The following points are important to the evaluation process and must be followed when using this Manual:

1. It is the **position** that is being evaluated and **not** the individual. Raters must make a conscious effort **not** to let knowledge of a particular incumbent or his/her performance influence evaluation decisions.

2. Each position will receive a point score under **each** factor. In factors that have both the "regular & recurring" and "occasional" components, select only one factor definition for each. For example, if in addition to "regular & recurring", you determine there is an "occasional" component that should be recognized, then select the factor definition that best describes that "occasional" element. The selected factor level must be a higher level than the level assigned to the "regular & recurring" component of the position. If the PDF describes multiple "occasional" elements, then review each one separately and assign the highest factor level that you have identified.

3. There are eight (8) factors that allow for an "occasional" value to be scored. If the evaluation of a position results in "occasional" values for 4 or 5 factors that position should be examined carefully. There could be a problem with the PDF not accurately reflecting the essential duties of the position or it may simply be the manner in which the job has been designed.

4. Read the entire definition of each level in a factor to get an accurate understanding of what it encompasses. Avoid any tendency to evaluate on the basis of a single word or phrase without assessing the entire definition.

5. The definitions provided for a factor pertain only to that factor. A "Glossary of Terms" has also been provided in the appendices.

6. Ongoing assigned "lead" or coordination duties that are an integral part of the position should be included in the PDF and evaluated as such.

Factors

1. Education

This factor looks at both the level of formal education required as well as the need for additional education that is not normally obtained within or is beyond the scope of the primary educational level.

A. This section identifies the **minimum** level of formal education that is required to perform the responsibilities of the position.

Notes to Raters:

1. Some types of on-the-job training are embedded in the period of the educational course or program. for example, work experience is part of a 3 or 4 year Co-op program. For others, such as, apprenticeship and professional designations, work experience is a mandatory requirement of the certification process. As this experience is completed prior to the certification process, it is considered under "Education" and not counted under "Experience".

2. Use today's educational levels and standards. It is the level of knowledge normally gained through "today's" standards which must be measured, not the educational background of the incumbent.

3. Levels 5 and 6 - "plus professional designation" means there is a **requirement for additional courses/education** as part of the certification process. Professional designations that are obtained by passing a qualifying examination or paying a licencing fee are not measured.

Education (1A)

Definitions

Factor Level and Definition	Points
1. Up to High School or equivalent	9
2. 1 year certificate or equivalent	22
3. 2 year diploma or equivalent	35

A 3 year Co-op diploma program would be rated here.

4. 3 year diploma/degree, trade certification, or equivalent	48
5. 4 year degree, or 3 year diploma/degree plus professional certification, or equivalent	61

A Professional Engineer (P. Eng) would be rated here.

6. Post graduate degree (e.g. Masters degree), or 4 year degree plus professional certification, or equivalent	74
7. Doctoral degree or equivalent	86

1. Education

B. In order to perform the responsibilities of the position, is there a requirement for specific course(s), certification, qualification, formal training or accreditation **in addition to** and not part of the educational level noted above in 1A. Include only requirements that would typically be included in the job posting/PDF as a mandatory requirement.

Notes to Raters:

1. Course(s) or certification that are part of the formal education referenced in 1A are not to be included. For example, if the PDF states a 1-year certificate in Section 1A and in 1B asks for additional computer courses, such as electronic spreadsheet, raters need to determine whether that skill or knowledge would be part of the 1-year certificate before rating.

2. Use today's educational levels and standards to determine whether the additional requirement is included in the formal education referenced in 1A or should be listed in 1B.

3. Do not include any sessions, seminars or training that are required and/or conducted after an incumbent is hired. For example, familiarization sessions on internal processes, email, or computerized record systems. Also exclude any courses that are designed to bring a particular employee's skills up to required levels, courses for general personal development (eg. interpersonal skills, leadership) or courses for general skills development, unless completion of that course would be mandatory.

4. If, after an incumbent is hired, job responsibilities change so that there is a requirement for additional education (as defined by 1B above) and that change would subsequently be included in the job posting/PDF, then those additional educational requirements must be considered.

5. There are many professions that require an individual to renew his/her licence on a regular basis (e.g. nursing). Courses taken to maintain a professional designation are not considered under this factor.

Education (1B)

Definitions

Factor Level and Factor Definition	Points
1. No additional requirements	3

A typical Con. Ed. course of 3 hours/week for 10 - 12 weeks would fall into this category.

Factor Level and Factor Definition	Points
2. Additional requirements obtained by course(s) with a total of 100 hours or less	12

Factor Level and Factor Definition	Points
3. Additional requirements obtained by course(s) with a total between 101 and 520 hours	21

Factor Level and Factor Definition	Points
4. Additional requirements obtained by course(s) with a total of more than 520 hours	30

2. Experience

This factor measures the typical number of years of experience, in addition to the necessary education level, required to perform the responsibilities of the position. Experience refers to the time required to understand how to apply the knowledge described under "Education" to the duties of the position. It refers to the minimum time required in prior positions to learn the techniques, methods and practices necessary to perform this job. This experience may be less than the experience possessed by the incumbent, as it refers only to the time needed to gain the necessary skills.

Notes to Raters:

1. Do not consider any experience that is part of a certification process or field time required for membership in a professional organization, designation or requirements for a license.

2. This factor does not measure the actual experience of the incumbent.

Experience

Definitions

Factor Level and Factor Definition	Points

If no additional work experience was required beyond the on-the-job training for a Co-op program; then experience would be rated here.

Factor Level and Factor Definition	Points
1. Less than 1 year	9

2. Minimum 1 year	24

3. Minimum 2 years	39

4. Minimum 3 years	54

5. Minimum 5 years	69

6. Minimum 8 years	86

3. Analysis and Problem Solving

This factor measures the level of complexity involved in analyzing situations, information or problems of varying levels of difficulty; and in developing options, solutions or other actions.

Notes to Raters:

1. Consideration must be given to the types of situations that arise and:
    - how situations, analytical requirements or problems are defined
    - the range of choice of action within the scope of the job
    - the level and type of investigation required
    - how complex or multi-faceted issues or problems are
    - from which sources assistance is obtained.

    This will help define the application of analysis and judgement within the scope of the job. The above elements must also be considered as a whole when selecting the appropriate level.

2. Consideration can only be given to the extent that judgement is allowed within the parameters and constraints identified in the position duties. Keep in mind, it is the requirement of the position not the incumbent's capability that is being evaluated.

3. To clarify the differences between levels 1, 2 and 3:

    Typically at **level 1**, the work performed by the position is quite structured and there is limited and/or specific ways to complete the tasks. If problems are encountered there is a limited selection of alternatives to explore. The tasks are most often found in a comprehensive instruction manual or detailed workplans.

    At **level 2**, the work performed is still quite structured, as the incumbent performs it in the customary or usual way. It is very evident when problems arise. However, the position has some freedom in determining how the problem could be resolved if normal past practice cannot be applied. For example, if a position was to post certain information on a daily basis and, for a reason never previously experienced by the incumbent, the information was not available, then the individual in the position would need to determine if a solution to another simular situation could be applied in this circumstance.

    At **level 3**, the types of problems that are encountered are readily identifiable but the position must be able to identify when additional information is needed to clearly understand the problem or situation. In order to develop an appropriate solution, the position will need to gather more information. In many circumstances, this additional information or clarification will be readily available, but there will be times when the position will need to seek the additional information from a source it is unfamiliar with.

    Level 2 versus **level 3** - wording in a PDF that suggests there is a need to get additional information, such as problems that require the incumbent to look at several sources of information or ask questions of other departments, does not necessarily mean that level 3 would apply. For example, if dealing with a question regarding a "hold" on a student record, the incumbent might have to check several screens on the student record system to see if it is a financial hold, or an academic hold, and might even have to contact the academic or finance department for an answer. However, these are procedural steps that should be followed one by one until the problem is identified and solved. There may be some judgement (level 2) in deciding which step to try first, but the analysis, if any, is quite straightforward (level 2). For level 3, the incumbent would be gathering information, analyzing each new piece of information in relation to the other pieces, and possibly exploring new or unusual directions to seek more information based on the results of the investigation or analysis.

Analysis and Problem Solving

Definitions

Analysis - to separate into parts and examine them in relation to basic principles to determine how they fit together or cause the problem.

Established instructions and procedures - verbal or written directions which outline the traditional way or explain the recognized way of accomplishing something; a particular course of action for carrying out a process (what, how and when steps will be accomplished).

Past practices - to perform work according to how it has customarily been done in the past or the usual way of doing something. Such practice does not have to be written down, but can arise on the basis of regular, repeated action.

Established techniques and/or principles - recognized guidelines and/or methods to accomplish a desired outcome. Can be defined as an individualized way of using tools and following rules in doing something; in professions, the term is used to mean a systematic procedure to accomplish a task.

Generally accepted principles - more general statements or parameters used to describe the desired outcome. Can be defined as the collectivity of moral or ethical standards or judgements.

Factor Level and Factor Definition	Regular & Recurring	Occasional
1. Analysis and problem solving is done according to established instructions and procedures. Solutions may require selection of the most appropriate, predefined alternative.	14	
2. Situations and problems are easily identifiable. Analysis or problem solving is straightforward. Solutions may require modification of existing alternatives or past practices.	46	9
3. Situations and problems are identifiable, but may require further inquiry in order to define them precisely. Solutions require the analysis and collection of information, some of which may be obtained from areas or resources which are not normally used by the position.	78	9
4. Situations and problems are not readily identifiable and often require further investigation and research. Solutions require the interpretation and analysis of a range of information according to established techniques and/or principles.	110	9
5. Situations and problems are complex and multi-faceted and symptoms are vague or incomplete. Further investigation is required. Solutions require the interpretation and analysis of information within generally accepted principles.	142	9

4. Planning/Coordinating

This factor measures the planning and/or coordinating requirements of the position. This refers to the **organizational and/or project management skills** required to bring together and integrate activities and resources needed to complete tasks or organize events. There may be a need to perform tasks with overlapping deadlines (multi-tasking) to achieve the decided results.

Notes to Raters:

1. Ongoing assigned "lead" or coordination duties that are an integral part of the position should be included in the PDF.

2. Planning is proactive while coordinating is reacting and organizing in response to planning.

3. To clarify the differences between levels 2, 3 and 4:

   Level 2 - the position plans and prioritizes its own activities. Planning and coordinating are typically focussed on completion of assigned activities within established deadlines or procedures (e.g. scheduling, coordination of data for reports, setting-up of new software in a department to meet specific business needs). The position may coordinate or make arrangements for an event by coordinating the calendars of others.

   Level 3 - the position decides the order and selects or adapts methods for many work assignments. Typically, the planning and coordination at this level, which affects the work schedule of others, are requests for materials/information by specific deadlines in order for the position to plan events or activities (e.g. conferences, research projects, upgrading hardware or software).

   Level 4 - typical planning and coordination at this level involves multiple inputs and complex tasks, frequently requiring the coordination of activities or resources of a number of departments, such as a major campus renovation or major technology upgrade. The position could be responsible for multiple, concurrent major projects at the same time. At this level, the position would have the authority to require others to modify their schedules and priorities.

Planning/Coordinating

Definitions

Factor Level and Factor Definition	Regular & Recurring	Occasional
Standardized - set in place, usual or customary. 1. Planning/coordinating skills are not normally required. Work is planned by others or determined by procedures. Deadlines are standardized.	8	
2. Plan/coordinate activities and resources to complete own work and achieve overlapping deadlines.	32	7
3. Plan/coordinate activities, information or material to enable completion of tasks and events, which affect the work schedule of other employees.	56	7
4. Plan/coordinate and integrate activities and resources for multi-faceted events, projects or activities involving other employees. This typically involves modifying these individuals' priorities for activities/projects to meet objectives.	80	7

Standardized - set in place, usual or customary.

Affect - to produce a material influence upon or alteration in.

Other employees - includes full-time, part-time, students, contractors.

Modify - to make basic or fundamental changes to give a new orientation to or to serve a new end.

5. Guiding/Advising Others

This factor refers to any **assigned responsibility** to guide or advise others (e.g. other employees, students, clients) in the area of the position's expertise. This is over and above communicating with others in that the position's actions directly help others in the performance of their work or skill development.

Support Staff in the Colleges cannot formally "supervise" others as defined by the Ontario Labour Board (e.g. hire, fire, handle first step grievances). However, there may be a requirement to guide others using specific job expertise. This is beyond being helpful and providing ad hoc advice. It must be an assigned responsibility and must assist or enable others to be able to complete their own tasks.

Note to Raters:

1. To clarify the differences between levels 3, 4 and 5:

    Level 3 - this may be a position with a particular area of expertise (e.g. accounting), which uses that expertise to assist others in completing their tasks. Involvement is generally of an advisory nature and the position is not responsible for how those advised subsequently complete their tasks.

    Level 4 - this may be a position that, while not responsible for formal supervision, is assigned to assist less experienced staff and is expected to actively contribute to their ongoing skill development.

    Level 5 - while not a formal "supervisor", the position has the assigned responsibility for allocating tasks and using its expertise to assist others and ensure that the tasks are completed satisfactorily.

Guiding/Advising Others

Definitions

Factor Level and Factor Definition	Regular & Recurring	Occasional
1. Minimal requirement to guide/advise others. May need to explain procedures to other employees or students.	5	
2. Guide others so they can complete specific tasks.	17	3
3. Advise others to enable them to perform their day-to-day activities.	29	3
4. Guide/advise others with ongoing involvement in their progress.	41	3
5. Responsible for allocating tasks to others and providing guidance and advice to ensure completion of tasks.	53	3

Explain - provides details or examples to help others better understand the information.

Others - College employees (FT or PT), students, clients.

Guide - demonstrates correct processes/procedures for the purpose of assisting others with skill development and/or task completion.

Advise - has the authority to recommend, or provide knowledgeable direction regarding a decision or course of action.

Ongoing Involvement - is intended to reflect a requirement to be involved for the duration of the process or skill development, in which the position is an active participant.

6. Independence of Action

This factor measures the level of independence or autonomy in the position. The following elements should be considered:

- the types of decisions that the position makes
- what aspects of the tasks are decided by the position on its own or what is decided by, or in consultation with, someone else, such as the supervisor
- the rules, procedures, past practice and guidelines that are available to provide guidance and direction

These considerations, when taken as a whole, will define the parameters and constraints of the position within which the incumbent is free to act.

Notes to Raters:

1. Sometimes Supervisors may be in another location, and not always physically available to the incumbent in the position. This does not automatically indicate a higher level of independence than for those who work in close proximity to their Supervisor. With the use of email, cell phones, pagers, etc. guidance may be readily available to the incumbent. Also, written and customary procedures, processes, etc may form a framework which guides much of the position's activities and results in a similar level of autonomy as an individual who is in the same physical location as his/her Supervisor.

2. When determining the guidance and direction provided also consider the checks and balances that are in place to verify the work. This includes activities, such as feedback by end users, computer system verification routines, other employees reviewing the work, work checked or verified during the next step of a process, supervisor reviews the work.

3. To clarify the differences between levels 2 and 3:

   Level 2 - duties are completed based upon pre-determined steps. Guidelines are available to assist, when needed. The position only has the autonomy to decide the order or sequence that tasks or duties should be performed.

   Level 3 - specific results or objectives that must be accomplished are pre-determined by others. The position has the ability to select the process(es) to achieve the end result, usually with the assistance of general guidelines. The position has the autonomy to make decisions within these parameters.

4. To clarify the differences between levels 4 and 5:

   Level 4 - the only parameters or constraints that are in place to guide the position's decision-making are "industry practices" for the occupation and/or departmental policies. The position has the autonomy to act within these boundaries and would only need to consult with the supervisor (or others) on issues that were outside these parameters.

   Level 5 - the only parameters or constraints that are in place to guide the positions's decision-making are College policies. The position has the autonomy to act within these boundaries and would only need to consult with the supervisor (or others) on issues that were outside these parameters.

Independence of Action

Definitions

Factor Level and Factor Definition	Regular & Recurring	Occasional
1. Position duties follow specific procedures. Decisions are typically made by selecting between defined options.	14	
2. Position duties are completed according to established procedures. Decisions are made following specific guidelines. Changes may be made to work routine(s).	46	9
3. Position duties are completed according to general processes. Decisions are made following general guidelines to determine how tasks should be completed.	78	9
4. Position duties are completed according to specific goals or objectives. Decisions are made using industry practices and/or departmental policies.	110	9
5. Position duties are completed according to broad goals or objectives. Decisions are made using College policies.	142	9

Procedure - a sequence of steps to perform a task or activity.

Guideline - a statement of policy or principle by which to determine a course of action.

Process - a series of activities, changes or functions to achieve a result.

Industry Practice - technical or theoretical method and/or process generally agreed upon and used by practitioners to maintain standards and quality across a range of organizations and settings.

Policies - broad guidelines for directing action to ensure proper and acceptable operations in working toward the mission.

7. Service Delivery

This factor looks at the service relationship that is an assigned requirement of the position. It considers the required manner in which the position delivers service to customers and not the incumbent's interpersonal relationship with those customers.

All positions have a number of customers, who may be primarily internal or external. The level of service looks at more than the normal anticipation of what customers want and supplying it efficiently. It considers how the request for service is received, for example directly from the customer; through the Supervisor or workgroup or project leader; or by applying guidelines and processes. It then looks at the degree to which the position is required to design and fulfil the service requirement.

Notes to Raters:

1. "Customers" refers to the people or groups of people who receive the services delivered by the position. They can be internal, students or external to the College.

2. Consider the position's overall or primary focus of service. For example, the primary focus may be to deliver or provide information.

3. To clarify the differences between the levels:

   Level 1 - service delivery is typically providing answers to customers' questions. There may be times when the incumbent will need to refer the customer to another source for the answer or the incumbent may need to consult with others to provide the appropriate answer.

   Level 2 - service is provided by determining which option would best suit the needs of the customer. The incumbent must know all of the options available and be able to explain them to the customer. The incumbent selects or recommends the best option based on the customer's need. There is no, or limited, ability for the incumbent to change the options. For example, positions working in the Financial Aid area would need to fully understand the various student loan programs that are available and based on a student's unique situation select or recommend the program that would best address the student's financial situation. The incumbent doesn't have the ability to change the funding programs, which are established by an external agency.

   Level 3 refers to the need to "tailor service". This means that in order for the position to provide the right type of service, he/she must ask questions to develop an understanding of the customer's situation. The customer's request must be understood thoroughly. Based on this understanding, the position is then able to customize the way the service is delivered or substantially modify what is delivered so that it suits the customer's particular circumstances.

   Level 4 means that the position designs services for others by obtaining a full understanding of their current and future needs. This information is considered in a wider context, which is necessary in order for the position to be able to structure service(s) that meet both the current stated needs and emerging needs. The position may envision service(s) before the customer is aware of the need.

Service Delivery

Definitions

Factor Level and Factor Definition	Regular & Recurring	Occasional
1. Provide service according to specific requests and established methods.	7	
2. Provide service according to specifications by selecting the best method of delivering service.	29	6
3. Tailor service based on developing a full understanding of the customer's needs.	51	6
4. Anticipate customer requirements and pro-actively deliver service.	73	6

Tailor - to modify or adapt with special attention in order to customize it to a specific requirement.

Anticipate - given advance thought, discussion or treatment to events, trends, consequences or problems; to foresee and deal with in advance.

Proactive - to act before a condition or event arises.

8. Communication

This factor measures the communication skills required by the position, both **verbal and written** and includes:

- communication to provide advice, guidance, information or training
- interaction to manage necessary transactions
- interpersonal skills to obtain and maintain commitment and influence the actions of others

Written communications includes letters, reports, proposals or other documents.

Notes to Raters:

1. Consider the need to initiate written text versus modifying the writing of others.

2. Do not consider communication between incumbents and their Supervisors.

3. To clarify the differences between levels 2 and 3:

   "Explain" and "interpretation" in **level 2** refers to the fact that it is information or data which needs to be explained or clarified. The position exchanges basic technical or administrative information as the normal course of the job and may be required to deal with minor conflicts or complaints. This level may also include exchanges that are of a more complex technical nature, where all the parties to the communication are technically competent. That is, for those people the communication is relatively basic as they share a vocabulary and understanding of the concepts.

   "Explain" and "interpretation" in **level 3** refers to the need to explain matters by interpreting policy or theory in such a way that it is fully understood by others. The position must consider the communication level/skill of the audience and be sensitive to their abilities and/or limitations. At this level, if the exchange is of a technical nature, then usually the audience is not fully conversant or knowledgeable about the subject matter. Unlike communicating with people who share an understanding of the concepts, in this situation the material has to be presented using words or examples that make the information understandable for non-experts or people who are not familiar with the intricacies of the information.

4. To clarify the differences between "gaining cooperation" in level 4 and "negotiation" in level 5:

   The assigned communication and interpersonal skills needed at both of these levels are at an extremely high level.

   "Gaining cooperation" refers to the skills needed to possibly having to move others to your point of view and gaining commitment to shared goals. The incumbent works within parameters determined by the department or College and usually there is a preferred outcome or goal. The audience may or may not have divergent views.

   "Negotiation" refers to having the authority to commit to a solution or compromise. An incumbent who communicates at this level also works within broad parameters and the preferred outcome is also broadly defined. The incumbent needs to have the skills/tools to reach an agreement that is then binding on the College. Normally, the audience will have divergent views or opposing objectives.

   Some people use the word "negotiation" for making arrangements that are relatively straightforward (e.g. negotiating a meeting date). In those situations, that type of communication would typically be considered an exchange of routine information. The use of the word "negotiation" is therefore quite specific in this factor.

Communication

Definitions

Factor Level and Factor Definition	Regular & Recurring	Occasional
1. Communication involves the exchange of routine information using courtesy and active listening.	14	
2. Communication involves the exchange of information that requires explanation and/or interpretation.	46	9
3. Communication involves explaining and/or interpreting information to secure understanding. May involve communicating technical information and advice.	78	9
4. Communication involves explaining and/or interpreting information to instruct, train and/or gain the cooperation of others.	110	9
5. Communication involves imparting information in order to obtain agreement, where interests may diverge, and/or negotiation skills to resolve complex situations.	142	9

Exchange - reciprocal giving and receiving.

Routine - uncomplicated, straightforward such as a task/procedure performed in an unvarying manner.

Explain - provide details or examples to help others better understand the information.

Interpret - explain or tell the meaning of; translates; convey the meaning of something.

Instruct - to give knowledge to or provide authoritative information within a formal setting such as a workshop or lab environment.

Train - impart knowledge and/or demonstrate skills within a formal instructional setting.

Negotiate - exchange views and proposals and obtain agreement with the aim of reaching agreement by shifting possibilities, proposals, and pros and cons. Issues are complex and outcome could be contentious.

9. Physical Effort

This factor measures the degree and frequency of the physical effort required by the position but does not include stiffness and strain from poor posture or work habits.

Notes to Raters:

1. Physical effort refers to the physical strain and fatigue caused by periods of any of the following:

   Physical Activities: lifting, bending, carrying, pushing, pulling, continuous standing or sitting, walking, climbing, running or jumping. Consideration is given to whether individuals in the position are able to move freely or change posture or stance.

   Muscle Strain: using groups of larger muscles in activities such as: working in awkward or cramped positions (e.g. bending, kneeling), manually lifting or moving objects, gripping, counter balancing or applying other firm pressure to operate machinery or equipment.

2. Level 1 includes the physical demand associated with occasionally lifting/carrying paper in order to restock a printer or photocopier as part of the normal office etiquette.

3. Included in this factor is any physical strain associated with travel and whether there is the ability to reduce strain from prolonged sitting.

4. To determine whether the physical effort is "regular & recurring" or "occasional", the associated duties or tasks and percentage of time from the Duties and Responsibilities section from the PDF must be referred to. For example, a position spends 15% of the time annually performing a receiving function. The physical effort is best reflected at Level 2, except there is a need to lift boxes weighing up to 50 lbs. To determine whether the lifting is "regular & recurring" or "occasional", the rater must break the physical effort elements down to identify the actual amount of time that lifting occurs annually. For this example, "heavy lifting" occurs throughout the day but in total is less than half a hour a day for 15% of the time. Clearly, this is an example of "occasional" heavy lifting.

Physical Effort

Definitions

Factor Level and Factor Definition	Regular & Recurring	Occasional
1. The position requires light physical effort.	5	

Light
- pushing, pulling or lifting lighter objects (less than 5 kg or 11 lbs)
- able to adjust working position to minimize physical stress.

Factor Level and Factor Definition	Regular & Recurring	Occasional
2. The position requires moderate physical effort.	26	6

Moderate
- pushing, pulling or lifting heavier objects (5 - 20 kg or 11 - 44 lbs)
- sustained handling of lighter objects (less than 5 kg or 11 lbs)
- restricted ability to adjust working position for longer periods of time (over 30 minutes) or sustaining awkward work positions (up to 30 minutes).

Heavy
- pushing, pulling or lifting heavy objects (greater than 20 kg or 44 lbs)
- sustained handling of objects (less than 20 kg or 44 lbs but greater than 5 kg or 11 lbs)
- sustaining awkward work positions for long periods (over 30 minutes).

Factor Level and Factor Definition	Regular & Recurring	Occasional
3. The positions requires heavy physical effort.	47	6

10. Audio/Visual Effort

This factor measures the requirement for audio or visual effort. The factor measures the following two aspects:

   a)   the degree of attention or focus required, in particular for:
   -   periods of short, repetitious tasks requiring audio/visual focus
   -   periods where task priorities and deadlines change and additional focus and effort is required to achieve the modified deadline

   b)   activities over which the position has little or no control that make focus difficult. This includes the requirement to switch attention between types of tasks and sensory input (eg. multi-tasking where each task requires concentration).

Assess the number and type of disruptions or interruptions and the impact of these activities on the focus or concentration needed to perform the task. For example, can concentration be maintained or is there a need to refocus or change thought processes in order to complete the task.

Notes to Raters:

1.   The scoring for this factor **is different from that used in other factors**. One score is selected from the table according to the period of concentration and the column regarding whether focus is interrupted or maintained. If more than one level applies, then select the level with the highest score that would typically apply.

2.   Raters must only consider tasks or situations where a **higher than usual level of focus or concentration is required**. It is important to consider the level of concentration that the task requires and not the incumbent's (in)ability.

3.   Concentration means undivided attention to the task at hand.

4.   Few interruptions or disruptions generally means that an appropriate level of concentration can be maintained for the duration of the task being performed. Where there are many disruptions, concentration must be re-established and the task completed in smaller units or steps.

5.   In determining what constitutes an interruption or disruption, you must first decide whether the "disruption" (eg. customer requests) is an integral or primary responsibility of the position (e.g. customer service, registration/counter staff, help desk, information desk). Then consider whether these activities are the primary or secondary aspect of the job. For example, if an individual has no other assigned tasks or duties while tending to customer requests, then those requests can not be seen as disruptions.

6.   Consider the impact of the disruption on the work being done. For example, can the incumbent in the position pick up where he/she left off or has the interruption caused a disruption in the thinking process and considerable time is spent backtracking to determine and pick up where he/she left off.

Audio/Visual Effort

Definitions

Focus Maintained - concentration can be maintained for most of the time.

Focus Interrupted - the task must be achieved in smaller units. There is a need to refocus on the task at hand or switch thought processes.

Short period - up to 30 minutes at one time.

Long period - up to 2 hours at one time including scheduled breaks.

Extended period - more than 2 hours at one time including scheduled breaks.

Factor Level and Factor Definition	Focus Maintained	Focus Interrupted
1. Regular & recurring short periods of concentration; or occasional long periods of concentration.	5	20
2. Regular & recurring long periods of concentration; or occasional extended periods of concentration.	20	35
3. Extended periods of concentration.	35	50

11.   Working Environment

This factor looks at the environment in which work is performed and the extent to which there exists undesirable or hazardous elements.

Notes to Raters:

1. This factor reflects working conditions that are real and not a condition that might occur.

2. Travel

    The actual mode of transportation is not an important element of travel. The travel component of working environment refers to the "undesirable" aspect of having to leave the work site and travel somewhere else to complete work assignments. Any physical strain associated with travel is considered under Physical Demand.

    Limited travel that occurs infrequently and is not necessarily needed in order for the position to perform its job duties can be captured within the definition for level 1. For example, a meeting that sometimes occur at a location other than the position's home campus and the position doesn't need to be in actual attendance (eg. teleconferencing).

    As a guide, travel that is a requirement of the position and occurs on a regular basis for more than 10% of the time (eg. equivalent of ½ a day a week or 2½ days per month) should be considered "regular and recurring".

Working Environment

Definitions

Factor Level and Factor Definition	Regular & Recurring	Occasional
1. Acceptable working conditions.	7	

Can be one or more of the elements listed.

Verbal abuse - derogatory or threatening comments.

Factor Level and Factor Definition	Regular & Recurring	Occasional
2. Working conditions involve: - difficult weather conditions - smelly, dirty or noisy environment(s) - exposure to very high/low temperatures - verbal abuse - working in isolated or crowded situations - travel	38	9

Abusive - verbal abuse; is more than dealing with someone who is angry or upset.

Factor Level and Factor Definition	Regular & Recurring	Occasional
3. Working conditions involve: - exposure to extreme weather conditions - handling of hazardous substances - dealing with abusive people who pose a threat of physical harm - accessing crawl spaces/confined spaces - other conditions which may pose a risk to personal safety.	69	9

Payband Determination Schedule

Payband	Total Point Ranges
A	100 - 159
B	160 - 219
C	220 - 279
D	280 - 339
E	340 - 399
F	400 - 459
G	460 - 519
H	520 - 579
I	580 - 639
J	640 - 699
K	700 - 759
L	760 or more

Glossary of Terms

Approach - the method used in dealing with or accomplishing something, e.g. a logical approach to a problem.

College Goals and Objectives - translation of broadly developed mission into more specific, results-oriented statements for work units of the organization.

Concept - an abstract notion or mental impression of an object; an idea or thought of what a thing or class of things is.

Duty - a service, function or set of tasks assigned to a position.

Element - smallest basic step that cannot be broken down further without analyzing separate motions and mental processes.

Employee - any individual on active payroll at the College. This includes full-time, part-time and students regardless of whether they are members of the bargaining unit.

Factors - a criterion or factor that can be utilized in the measurement of worth and by inference, the value of a job. The four major criteria used to measure jobs are skill, responsibility, effort and working conditions.

Factor Level - the actual measurement levels within each factor.

Incumbent - the individual assigned to the position.

Job - **see Position.**

Job Evaluation - the body of rules set forth in this manual for measuring the value of jobs in relation to each other; this value is expressed in points.

Job Evaluation System - a measuring tool used to rate jobs. It contains factor levels and points, definitions and notes to raters.

Mission - broad or general value-laden terms defining what an organization wishes to accomplish in the long term - the kind of product it intends to provide and how it intends to provide it. Details the reasons for the existence of the organization.

Pay Equity - a pay practice based primarily on the relative value of work performed whether the worker is male or female.

Points - the numerical value assigned to each level within each factor.

Point Rating System - an analytical, quantitative method of evaluating jobs. The job is analyzed in terms of the factors of the system and assigned a point value for each factor.

Position - work responsibilities and duties assigned by an appointing authority to an employee(s). Set of responsibilities and duties that describe the work that must be done.

Position Description Form - the written description of a position that includes a summary and a listing of the major duties and responsibilities.

Precedent - an act or ruling that maybe used as an example or rule for one coming later; a convention or custom.

Professional - work concerned with the creative and conceptual application of theoretical and practical aspects of such fields as social science, human resources, law, medicine, engineering, public relations, library science, computer science, business, etc, with decision making related to subject matter, duties, and consequences of action. Licensure may be a determining aspect.

Project - planned undertaking of experimental, short term, or research nature. Requires the focused application of human, fiscal and real resources for a specified period of time in order to accomplish the goals and objectives of the project.

Project Management - the process and methodologies used to lead human resources brought together to accomplish a specified set of goals and objectives within a specified time and budget.

Rating - the process of relating the facts contained in the position description to the job evaluation plan and selecting the factor level that is most appropriate.

Task - an objective or a piece of work assigned or done as part of one's duties.

Technique - a individualized way of using tools and following rules in doing something; in professions, the term is used to mean a systematic procedure to accomplis a scientific task.

Sample Position Description Form (PDF)

College:

Incumbent's Name:

Position Title: Payband:

Position Code/Number (if applicable):

Supervisor's Name and Title:

Completed by: Date:

Signatures:

Incumbent: Date:
(Indicates the incumbent has read and understood the PDF)

Supervisor: Date:

Supervisor's Supervisor: Date:

Instructions for Completing the PDF

1. Read the form carefully before completing any of the sections.

2. Answer each section as completely as you can based on the typical activities or requirements of the position and not on exceptional or rare requirements.

3. If you have any questions, refer to the document entitled "A Guide on How to Write Support Staff Position Description Forms" or contact your Human Resources representation for clarification.

4. Ensure the PDF is legible.

5. Responses should be **straightforward and concise using simple factual statements.**

Position Summary

Provide a concise description of the overall purpose of the position.

Duties and Responsibilities

Indicate as clearly as possible the significant duties and responsibilities associated with the position. Indicate the approximate percentage of time for each duty. Describe duties rather than detailed work routines.

	Approximate % of time annually*

* To help you estimate approximate percentages:

½ hour a day is 7%	1 hour a day is 14%	1 hour a week is 3%
½ day a week is 10%	½ day a month is 2%	1 day a month is 4%
1 week a year is 2%		

1. Education

A. Check the box that best describes the **minimum** level of **formal** education that is required for the position and specify the field(s) of study. Do not include on-the-job training in this information.

☐ Up to High School or equivalent	☐ 1 year certificate or equivalent	☐ 2 year diploma or equivalent
☐ Trade certification or equivalent	☐ 3 year diploma/degree or equivalent	☐ 3 year diploma/degree plus professional certification or equivalent
☐ 4 year degree or equivalent	☐ 4 year degree plus professional certification or equivalent	☐ Post graduate degree (e.g. Masters) or equivalent
☐ Doctoral degree or equivalent		

Field(s) of Study:

```
[                                                                    ]
```

B. Check the box that best describes the requirement for specific course(s), certification, qualification, formal training or accreditation in addition to and not part of the education level noted above and in the space provided specify the additional requirement(s). Include only the requirement that would typically be included in the job posting and would be acquired prior to the commencement of the position. Do not include courses that are needed to maintain a professional designation.

☐ No additional requirements	
☐ Additional requirements obtained by course(s) of a total of 100 hours or less	
☐ Additional requirements obtained by course(s) of a total between 101 and 520 hours	
☐ Additional requirements obtained by course(s) of a total of more than 520 hours	

2. Experience

Experience refers to the minimum time required in prior position(s) to understand how to apply the techniques, methods and practices necessary to perform this job. This experience may be less than experience possessed by the incumbent, as it refers only to the minimum level required on the first day of work.

Check the box that best captures the typical number of year of experience, in addition to the necessary education level, required to perform the responsibilities of the position and, in the space provided, describe the type of experience.

☐ Less than one (1) year

☐ Minimum of one (1) year

☐ Minimum of two (2) years

☐ Minimum of three (3) years

☐ Minimum of five (5) years

☐ Minimum of eight (8) years

3. Analysis and Problem Solving

This section relates to the application of analysis and judgement within the scope of the position.

The following charts help to define the level of complexity involved in the analysis or identification of situations, information or problems, the steps taken to develop options, solutions or other actions and the judgement required to do so.

Please provide up to three (3) examples of analysis and problem solving that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

#1 regular & recurring

Key issue or problem encountered.	
How is it identified?	
Is further investigation required to define the situation and/or problem? If so, describe.	
Explain the analysis used to determine a solution(s) for the situation and/or problem.	
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	

3. Analysis and Problem Solving

#2 regular & recurring

Key issue or problem encountered	
How is it identified?	
Is further investigation required to define the situation and/or problem? If so, describe.	
Explain the analysis used to determine a solution(s) for the situation and/or problem.	
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	

#3 regular & recurring

Key issue or problem encountered	
How is it identified?	
Is further investigation required to define the situation and/or problem? If so, describe.	
Explain the analysis used to determine a solution(s) for the situation and/or problem.	
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	

3. Analysis and Problem Solving

#1 occasional (if none, please strike out this section)

Key issue or problem encountered	
How is it identified?	
Is further investigation required to define the situation and/or problem? If so, describe.	
Explain the analysis used to determine a solution(s) for the situation and/or problem.	
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	

#2 occasional (if none, please strike out this section)

Key issue or problem encountered	
How is it identified?	
Is further investigation required to define the situation and/or problem? If so, describe.	
Explain the analysis used to determine a solution(s) for the situation and/or problem.	
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	

4. Planning/Coordinating

Planning is a proactive activity as the incumbent must develop in advance a method of acting or proceeding, while coordinating can be more reactive in nature.

Using the following charts, provide up to three (3) examples of planning and/or coordinating that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

#1 regular & recurring

List the project and the role of the incumbent in this activity.	
What are the organizational and/or project management skills needed to bring together and integrate this activity?	
List the types of resources required to complete this task, project or activity.	
How is/are deadline(s) determined?	
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	

4. Planning/Coordinating

#2 regular & recurring

List the project and the role of the incumbent in this activity.

What are the organizational and/or project management skills needed to bring together and integrate this activity?

List the types of resources required to complete this task, project or activity.

How is/are deadline(s) determined?

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

#3 regular & recurring

List the project and the role of the incumbent in this activity.

What are the organizational and/or project management skills needed to bring together and integrate this activity?

List the types of resources required to complete this task, project or activity.

How is/are deadline(s) determined?

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

4. Planning/Coordinating

#1 occasional (if none, please strike out this section)

List the project and the role of the incumbent in this activity.	
What are the organizational and/or project management skills needed to bring together and integrate this activity?	
List the types of resources required to complete this task, project or activity.	
How is/are deadline(s) determined?	
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	

#2 occasional (if none, please strike out this section)

List the project and the role of the incumbent in this activity.	
What are the organizational and/or project management skills needed to bring together and integrate this activity?	
List the types of resources required to complete this task, project or activity.	
How is/are deadline(s) determined?	
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	

5. Guiding/Advising Others

This section describes the **assigned responsibility** of the position to guide or advise others (e.g. other employees, students). Focus on the actions taken (rather than the communication skills) that directly assist others in the performance of their work or skill development.

Though Support Staff cannot formally "supervise" others, there may be a requirement to guide others using the incumbent's job expertise. This is beyond being helpful and providing ad hoc advice. It must be an assigned responsibility and must assist or enable others to be able to complete their own tasks.

Check the box(es) that best describe the level of responsibility assigned to the position and provide an example(s) to support the selection, including the positions that the incumbent guides or advises.

Regular & Recurring	Occasional	Level	Example
☐		Minimal requirement to guide/advise others. The incumbent may be required to explain procedures to other employees or students.	
☐	☐	There is a need for the incumbent to demonstrate correct processes/ procedures to others so that they can complete specific tasks.	
☐	☐	The incumbent recommends a course of action or makes decisions so that others can perform their day-to-day activities.	
☐	☐	The incumbent is an active participant and has ongoing involvement in the progress of others with whom he/she has the responsibility to demonstrate correct processes/procedures or provide direction.	
☐	☐	The incumbent is responsible for allocating tasks to others and recommending a course of action or making necessary decisions to ensure the tasks are completed.	

6. Independence of Action

Please illustrate the type of independence or autonomy exercised in the position. Consideration is to be given to the degree of freedom and constraints that define the parameters in which the incumbent works.

What are the instructions that are typically required or provided at the beginning of a work assignment?	
Regular and Recurring	Occasional (if none, please strike out this section)

What rules, procedures, past practices or guidelines are available to guide the incumbent?	
Regular and Recurring	Occasional (if none, please strike out this section)

How is work reviewed or verified (eg. feedback from others, work processes, Supervisor)?	
Regular and Recurring	Occasional (if none, please strike out this section)

6. Independence of Action

Describe the type of decisions the incumbent will make in consultation with someone else other than the Supervisor.	
Regular and Recurring	Occasional (if none, please strike out this section)

Describe the type of decisions that would be decided in consultation with the Supervisor.	
Regular and Recurring	Occasional (if none, please strike out this section)

Describe the type of decisions that would be decided by the incumbent.	
Regular and Recurring	Occasional (if none, please strike out this section)

7. Service Delivery

This section looks at the service relationship that is an assigned requirement of the position. It considers the required manner in which the position delivers service to customers. It is not intended to examine the incumbent's interpersonal relationship with those customers and the normal anticipation of what customers want and then supplying it efficiently. It considers how the request for service is received and the degree to which the position is required to design and fulfil the service requirement. A "customer" is defined in the broadest sense as a person or groups of people and can be internal or external to the College.

In the table below, list the key service(s) and its associated customers. Describe how the request for service is received by the incumbent, how the service is carried out and the frequency.

Information on the service		Customer	Frequency (D, W, M. I)*
How is it received?	How is it carried out?		

*   D = Daily W = Weekly   M = Monthly   I = Infrequently

8. Communication

In the table below indicate the type of communication skills required to deal effectively with others. Be sure to list both verbal (e.g. exchanging information, formal presentations) and written (e.g. initiate memos, reports, proposals) in the section(s) that best describes the method of communication.

Communication Skill/Method	Example	Audience	Frequency (D, W, M ,I)*
Exchanging routine information, extending common courtesy			
Explanation and interpretation of information or ideas			
Imparting technical information and advice			
Instructing or training			
Obtaining cooperation or consent			
Negotiating			

*   D = Daily W = Weekly   M = Monthly   I = Infrequently

9. Physical Effort

In the tables below, describe the type of physical activity that is required on a regular basis. Please indicate the activity as well as the frequency, the average duration of each activity and whether there is the ability to reduce any strain by changing positions or performing another activity. Activities to be considered are sitting, standing, walking, climbing, crouching, lifting and/or carrying light, medium or heavy objects, pushing, pulling, working in an awkward position or maintaining one position for a long period.

Physical Activity	Frequency (D, W, M, I)*	Duration			Ability to reduce strain		
		< 1 hr at a time	1 - 2 hrs at a time	> 2 hrs at a time	Yes	No	N/A

*   D = Daily W = Weekly   M = Monthly   I = Infrequently

If lifting is required, please indicate the weights below and provide examples.

☐   Light (up to 5 kg or 11 lbs)

☐   Medium (between 5 to 20 kg or 11 to 44 lbs)

☐   Heavy (over 20 kg or 44 lbs)

10. Audio Visual Effort

Describe the degree of attention or focus required to perform tasks taking into consideration:
- the audio/visual effort and the focus or concentration needed to perform a task and the duration of the task, including breaks (eg. up to 2 hours at one time including scheduled breaks)
- impact on attention or focus due to changes to deadlines or priorities
- the need for the incumbent to switch attention between tasks (eg. multi-tasking where each task requires focus or concentration)
- whether the level of concentration can be maintained throughout the task or is broken due to the number of disruptions

Provide up to three (3) examples of activities that require a higher than usual need for focus and concentration.

Activity #1	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs

Can concentration or focus be maintained throughout the duration of the activity? If not, why?
- □   Usually
- □   No

Activity #2	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs

Can concentration or focus be maintained throughout the duration of the activity? If not, why?
- □   Usually
- □   No

Activity #3	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs

Can concentration or focus be maintained throughout the duration of the activity? If not, why?
- □   Usually
- □   No

*   D = Daily   W = Weekly   M = Monthly   I = Infrequently

11.   Working Environment

Please check the appropriate box(es) that best describes the work environment and the corresponding frequency and provide an example of the condition.

Working Condition	Example	Frequency (D, W, M, I)*
☐ acceptable working conditions (minimal exposure to the conditions listed below)		
☐ accessing crawl spaces/confined spaces		
☐ dealing with abusive people		
☐ dealing with abusive people who pose a threat of physical harm		
☐ difficult weather conditions		
☐ exposure to extreme weather conditions		
☐ exposure to very high or low temperatures (e.g. freezers)		
☐ handling hazardous substances		
☐ smelly, dirty or noisy environments		
☐ travel		
☐ working in isolated or crowded situations		
☐ other (explain)		

*   D = Daily   M = Monthly   W = Weekly   I = Infrequently

Sample Job Evaluation Form

Incumbent: _____ Supervisor: _____

Position Title: _____ Current Payband: _____

Effective Date of PDF: _____ Date of Evaluation: _____

Factor	Comments	Regular & Recurring		Occasional	
		Level	Points	Level	Points
1A. Education					
1B. Education					
2. Experience					
3. Analysis/ Problem Solving					
4. Planning/Coordinating					
5. Guiding/Advising Others					
6. Independence of Action					
7. Service Delivery					
8. Communication					
9. Physical Effort					
10. Audio/Visual Effort					
11. Working Environment					
Subtotals		(a)		(b)	
Total Points (a) + (b)					
Resulting Payband					

Additional Comments: _____

_____

Arbitration Data Sheet - Support Staff Classification

College: _____ Incumbent: _____ Supervisor: _____

Current Payband: _____ Payband Requested by Grievor: _____

1. Concerning the attached Position Description Form:

   ☐ The parties agreed on the contents ☐ The Union disagrees with the contents and the specific details are attached.

2. The attached Written Submission is from: ☐ The Union ☐ The College

Factor	Management				Union				Arbitrator			
	Regular/ Recurring		Occasional		Regular/ Recurring		Occasional		Regular/ Recurring		Occasional	
	Level	Points	Level	Points	Level	Points	Level	Points	Level	Points	Level	Points
1A. Education												
1B. Education												
2. Experience												
3. Analysis and Problem Solving												
4. Planning/Coordinating												
5. Guiding/Advising Others												
6. Independence of Action												
7. Service Delivery												
8. Communication												
9. Physical Effort												
10. Audio/Visual Effort												
11. Working Environment												
Subtotals	(a)		(b)		(a)		(b)		(a)		(b)	
Total Points (a) + (b)												
Resulting Payband												

Signatures:

_____ _____ _____ _____
(Grievor) (Date) (College Representative) (Date)

_____ _____
(Union Representative) (Date)

_____ _____ _____
(Arbitrator's Signature) (Date of Hearing) (Date of Award)