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# JOINT JOB EVALUATION QUESTIONNAIRE

# GUIDE BOOK

## August 2010

# UNIVERSITY OF VICTORIA / PROFESSIONAL EMPLOYEES ASSOCIATION

**JOINT JOB EVALUATION PLAN/QUESTIONNAIRE GUIDE BOOK**

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Introduction

The University (UVic) and PEA agreed to develop a joint Job Evaluation Plan in the first collective agreement concluded in 1996 (Art. 19.03). The goal was to jointly establish a gender-neutral job evaluation plan to facilitate the objectives of equal pay for work of equal value and the University’s competitiveness with respect to recruitment and retention of staff members.

This alternative to the existing classification plan was instituted to provide the Parties the ability to jointly (i.e. both the PEA and the University) evaluate jobs based on a more systematic assessment of the bona fide job requirements of skill, effort, responsibility and working conditions.

A committee was established consisting of Human Resources and PEA staff with experience in job evaluation; a consultant to guide the process; and PEA members and excluded staff with extensive job knowledge of PEA positions. The work of the committee has resulted in the development of a point-factor job evaluation plan and questionnaire, which is included in this document.

This document contains the guidelines, general instructions, and factor definitions. **We recommend you print a copy to use as a guide when completing the Job Evaluation Questionnaire (JEQ)**. The JEQ contains the level definitions for each factor that you will select to rate your job as well as space for you to provide examples to illustrate your choices for each factor.

The Job Evaluation Questionnaire also contains a section that provides you with the opportunity to describe your position function, and to give examples of the primary duties and responsibilities of your job.

The Committee requests that you carefully read the guidelines and instructions below before attempting to answer the questions in the Job Evaluation Questionnaire.

Thank you for your participation in this process.

General Guidelines

1. The Position Summary at the beginning of the Questionnaire gives you an opportunity to think about the major aspects of your job. Please fill out the Position Summary before completing the rest of the Questionnaire. Highlight any changes to your job responsibilities since the last job evaluation.
2. After completing the Questionnaire, please sign and date the signature page and forward it to your supervisor along with an electronic copy of the Questionnaire. The Questionnaire will be reviewed and the signature page signed by your supervisor.

Your supervisor is defined to be the person who has both formal and direct supervisory responsibility for your position (see Factor 8 Notes). In situations where there is a shared supervisory responsibility, the formal supervisor should sign the signature page of the Questionnaire. Where there is a higher level manager above the supervisor, the supervisor should also consult with the manager before finalizing any comments.

1. Supervisors must not change a staff member’s response. The role of supervisors is to provide comments and additional input, so that positions under their supervision are treated equitably and so that all positions can be accurately compared.
2. Supervisors will forward the signed signature page and the electronic copy of the Questionnaire to the excluded manager of the administrative unit (typically the Dean or Executive Director) for comment and signature.
3. The excluded manager will return the electronic copy of the Questionnaire and the signature page to the staff member for final comment and signature.
4. Once you have made any final comments and signed the signature page of the Questionnaire, please save a copy of the Questionnaire and email a copy to your manager..
5. Then forward the electronic copy of the Questionnaire to UVic Human Resources at [peajec@uvic.ca](mailto:peajec@uvic.ca)
6. Mail the completed signature page of the Questionnaire to UVic Human Resources: attention PEA Joint Job Evaluation Committee.
7. The Joint Committee will review staff members’ responses to the twelve factors in the Questionnaire for consistency with the:

* Position summary information
* Job-specific examples provided in support of each factor response
* Supervisor review comments
* Responses for comparable positions throughout the University of Victoria.

1. The completed Questionnaire will be used for job evaluation purposes only. Otherwise, your responses will be kept in confidence.

JOINT JOB EVALUATION QUESTIONNAIRE - INSTRUCTIONS

1. The Joint Job Evaluation Questionnaire is designed to measure the bona fide job requirements of PEA positions, not the incumbent’s own qualifications or job performance. Job evaluations are based on the typical work performed over the course of a year, rather than on any unusual assignments or duties not regularly performed. **Do not consider anticipated changes in your position**. Those may be dealt with in a future evaluation.
2. The purpose of each factor is stated with a brief explanation. Please read the definition of each factor carefully before selecting a response level.

Notes are provided with examples to assist you in understanding the factors and the terms used. The examples, which serve as illustrations, are not all-inclusive and are not arranged in order of importance.

1. Instructions for answering each factor are provided, together with a series of response options. Please read all response options for each factor. Consider examples in your job that illustrate your choice before selecting the response that *best* describes your job.
2. The response options for each factor are arranged in a hierarchy. Because each progressive response level is intended to include all preceding options, always respond at the highest level applicable to your job considering *all* of the statements in the level description.

Please select *only one* response level for each factor. Make sure you answer *all* questions even though you may find that some apply to your job more than others do.

The best fit may not be exact. If you have difficulty in deciding between two possible responses, select the level that is the closest fit to the core function of your job.

1. Please provide specific examples of work-related activities in enough detail to illustrate your responses. This will assist the Joint Committee to understand the reasons you selected a particular response level.
2. If you have any questions about the Joint Job Evaluation Questionnaire, please contact:

Your HR Advisor – Classifications & Recruitment [http://www.uvic.ca/hr/contact/index.php - acc-1-total-compensation-and-recruitment](http://www.uvic.ca/hr/contact/index.php#acc-1-total-compensation-and-recruitment) OR

PEA Labour Relations Officer (<http://www.pea.org/staff-profiles.html> 250-385-8791 Ext: 201)

Email: [peajec@uvic.ca](mailto:peajec@uvic.ca)

**FACTOR 1 – PROBLEM SOLVING**

##### Definition

This factor assesses the application of knowledge to the analysis and resolution of problems. It is a measure of the difficulty and complexity of the work.

##### Notes

In applying this factor, consider the requirement for problem solving, which involves thinking activities. Please also consider the extent to which such thinking is circumscribed by the existence of guidelines, standards, precedents and available assistance.

Thinking activities include such things as: reasoning, analysis, diagnosis, interpretation, creativity, evaluation and judgement.

This factor assesses the *skill* involved in thinking, it does not measure the *responsibility* involved in making decisions. Decision making responsibility is measured under Factor 9.

**Complex**: consisting of many interconnected or interwoven parts or dimensions; involved or intricate in structure; hard to separate, analyze, or solve.

**Investigation**: detailed, thorough, step by step observation, enquiry, or systematic examination; research, study.

**FACTOR 2 – KNOWLEDGE**

**Definition**

**This factor assesses the depth and breadth of knowledge required to perform the duties of the job. Such knowledge is acquired through some combination of training and experience.**

# Notes

This factor does not assess the training and experience of the job incumbent. It measures the minimum level of training and experience required to perform the duties of the position.

**Depth** of knowledge refers to the degree of knowledge in a particular subject area and increases with specialization.

**Breadth** of knowledge refers to the range or scope of knowledge within a broadly defined subject area, or to the range or scope of knowledge across subject areas or work areas of the University.

This factor assesses the knowledge required to perform the work, not the application of that knowledge or the difficulty of the work – these are measured under Factor 1, Problem Solving.

**Subject area:** a particular body of knowledge, such as computer programming, computer network support, admissions or registration procedures and regulations, or regulations or policies of a government or an external organization

**Work area:** an organizational unit with which the position must be familiar, such as the Biology Department, Career Services, or the Office of the Administrative Registrar.

**Training:** formal education, job-related courses, self-study or on-the-job training.

**Experience:** any work or life experience that directly contributes to the ability to perform the duties of the job, including on-the-job experience.

**Complex:** consisting of many interconnected or interwoven parts or dimensions; involved or intricate in structure; hard to separate, analyze, or solve.

**FACTOR 3 – COMMUNICATION**

# Definition

This factor assesses the skills typically required to communicate with others in carrying out the duties of the job.

# Notes

**Others** include: students, clients, patients, faculty, staff, volunteers, members of other organizations and the general public.

**Types of communication** include: oral, written, numeric, visual or graphic, signing, Braille and non-verbal communication including listening and gesturing.

Consider also the context and purpose of the communication since this may have an effect on the type and level of communication skills required. The context and purpose may include such things as: providing information, interviewing, providing individual instruction, making formal or informal presentations, addressing assemblies, leading group discussions, chairing meetings, conducting seminars or providing classroom instruction, acting as spokesperson or preparing complex submissions or proposals.

Activities such as listening and gesturing in order to guide interactions are measured here as skills. The sensory or mental effort involved in these activities is measured under Factor 4, Mental Effort.

Who the communication is with is important only to the extent that it helps define the type, purpose and complexity of communication.

**FACTOR 4 – MENTAL EFFORT or CONCENTRATION**

**Definition**

This factor assesses the mental effort and strain that are typically required to perform the duties of the job. It assesses the frequency and duration of periods of intense concentration.

**Notes**

Mental effort is the concentration involved in thinking. In applying this factor, consider the intensity of concentration and the extent to which it causes fatigue. Also consider how much alertness and attention to detail are required.

This factor measures the frequency and duration of effort that is required when focussing intently on a single task or series of tasks for an uninterrupted period.

The effect of conditions such as interruptions, multiple demands, peak periods and deadlines is measured under Factor 12.

**Frequency of uninterrupted concentration***:*

**Occasional** - once or twice a week, or a few times month

**Frequent** – several times a day or many times a week

**Constant** – the majority of the work time

Duties that occur quarterly or annually for substantial periods of time (e.g. quarterly for several days, or annually for several weeks) should be considered **frequent.**

**Duration of uninterrupted concentration***:*

**Short** - up to 1 hour

**Medium** - 1 to 2 hours

**Lengthy** - more than 2 hours

FACTOR 5 – PHYSICAL EFFORT

**Definition**

This factor assesses the physical effort and strain that are typically required to perform the duties of the job. It assesses the intensity, frequency and duration of periods of physical effort, as well as the presence of adverse elements that increase effort and strain.

**Notes**

Physical effort includes all of those bodily activities that result in fatigue.

In applying this factor, consider large muscle activities such as:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| * stooping | * bending | * carrying | * standing | * reaching |
| * pushing | * pulling | * climbing | * lifting | * walking |

Also consider small precise muscle activities involving the hands and eyes such as:

|  |  |
| --- | --- |
| * keyboarding | * calibrating instruments |

**Adverse elements** include:

* awkward or restricted working positions (crouching, crawling, leaning)
* confined work spaces
* physicalhandling of awkward or resistant objects, including people or animals

or other such factors that increase the physical effort and strain.

Frequency:

**Occasional** - once or twice a week, or a few times month

**Frequent** – several times a day or many times a week

**Constant** – the majority of the work time

Duties that occur quarterly or annually for substantial periods of time (e.g. quarterly for several days, or annually for several weeks) should be considered **frequent.**

Intensity:

**Light physical effort** - lifting, pushing, pulling or carrying light weights (up to 5 kg./11 lbs.), stooping, reaching, climbing stairs, standing, walking, sporadic or intermittent keyboarding.

**Moderate physical effort** - lifting, pushing, pulling or carrying moderate weights (over 5 up to 10 kg./ over 11 up to 22 lbs.), climbing ladders, small muscle activity (intense, strenuous keyboarding, calibrating).

**Heavy physical effort** - lifting, pushing, pulling, or carrying heavy weights (over 10 kg./22 lbs.), climbing while carrying loads.

# FACTOR 6 - RESPONSIBILITY FOR INTERACTIONS

Definition

This factor assesses the responsibility for providing services to others through direct contact. It measures the provision of assistance, advice, support, counselling, or instruction and training that affects the interests or well being of others.

**Notes**

All professional jobs provide services to others in some way, however many jobs at the University provide services directly to students, faculty, staff (outside their work unit) and members of the public. It is such service that this factor assesses. It does not measure the communication or problem solving skills which are assessed in Factors 1 and 3. Responsibility for supervision of services is accounted for under Factors 8 and 9.

**Direct Contact**: face to face interactions, email, and/or telephone contacts where the provider is representing the University, the Division or Faculty, or the administrative unit.

**Services** may include:

Providing advice, information, support and counselling, such as:

* advising applicants on admission requirements
* responding to inquiries or complaints
* interviewing a student about an emergency loan
* advising faculty or staff concerning a project
* assisting a client with a technical problem
* counselling a student in an emotional crisis
* supporting a student with a work placement or practicum placement problem
* making presentations to students and external groups

Providing instruction and training such as:

* conducting a workshop or training session
* instructing a science laboratory
* teaching an undergraduate class

**Work unit**: the immediate work area or section providing a specific service(s), or program(s).

##### Frequency of Interactions

**Occasional** - once or twice a week, or a few times a month

**Frequent** – **several times** a day or **many** times a week

**Constant** – **the majority of the work time**

# FACTOR 6 - RESPONSIBILITY FOR INTERACTIONS (cont’d)

## **Nature of Interaction**

1. Providing general advice, information, assistance, support or basic instruction;
2. Providing in depth, detailed advice, information, assistance, support or instruction of a specialized nature;
3. Providing clinical counselling or, providing formal representation, advocacy*,* assistance or support, sometimes of a critical orurgent nature

**This factor measures the responsibility for direct person-to-person service that has an effect on the interests or well being of others.**

**FACTOR 7 – RESPONSIBILITY FOR FINANCIAL AND MATERIAL RESOURCES**

##### Definition

This factor assesses the extent of responsibility exercised for the care, maintenance, protection and control of resources, including financial resources and material resources.

##### Notes

**Financial Resources** include such things as:

* cash, cheques, receipts and invoices, accounting and reconciliation, fees, collections, payroll, banking and investment records, cost recoveries
* ordering and purchasing requisitions and tender documents
* budgeting for an operating unit or a research or capital project
* scholarships, bursaries, and internal student loans
* grant and other external revenue, funds raised or donations in kind
* funding, costing and cost benefit recommendations
* payments and authorizations
* financial procedures, policies and regulations, financial systems

**related activities:** monitoring, reconciling, recommending, tendering, auditing, administering, developing, approving

**Material Resources** include such things as:

* supplies and perishable goods
* non-perishable goods, furniture
* tools and minor equipment
* capital equipment, including vehicles and computer hardware
* books, computer software and other learning resources
* physical plant, facilities, buildings, workshops, labs, offices, grounds and related services
* data, records, files, communication links and computer networks, databases, computer programs, information systems
* research sources and materials
* directories, statistics, maps, graphics, schematics and drawings

**related activities:** care, safety, security, maintenance, repair, installation, modification, alteration, construction, administration, organizing, interpreting, modelling, creating, distributing, classifying, cataloguing, securing, processing, designing, computer technical development and support

**Work unit**: the immediate work area or section providing a specific service(s), or program(s).

**Administrative unit**: an administrative or academic entity, typically a department or school. In some cases, this may apply to a small faculty or a component of a division such as Records Services within the Office of the Administrative Registrar, or the Grounds unit within Facilities Management.

**FACTOR 8 – RESPONSIBILITY FOR HUMAN RESOURCES**

##### Definition

This factor assesses the degree of responsibility for providing guidance, direction, training and supervision to others in their work.

##### Notes

**Others** includes: co-workers, other staff, students, faculty, volunteers, and users of University services who rely on the expertise of the position in order to operate equipment, use facilities or carry out activities.

Those supervised may be regular, temporary, full-time, part-time or casual employees, student employees, interns, contractors, consultants, or staff assigned to a specific project.

**Guidance** and **direction** include:

* orientation
* assistance
* mentoring
* advice, suggestions, recommendations
* technical or functional support
* informally assigning, monitoring, checking, reviewing work

**Training** includes:

* instructing new employees in the functions of their jobs
* instructing others on the use of equipment, systems, processes, procedures

**Supervision** may include any or all of the following:

|  |  |
| --- | --- |
| * assigning, monitoring, checking, reviewing work | * conducting performance appraisals |
| * organizing, co-ordinating work | * interviewing for promotion or hiring |
| * scheduling staff | * selection of staff |
| * approving vacations, leaves, overtime | * recommending discipline |
| * motivating staff | * disciplining staff |
| * coaching staff | * input into recruiting, hiring |
| * discussing expectations and outcomes | * recommending termination |
| * input into performance appraisal | * evaluating impact of staff absences |

**FACTOR 8 – RESPONSIBILITY FOR HUMAN RESOURCES (Cont’d)**

**Supervision** may be formal or informal, direct or indirect:

**Informal**: performing supervisory tasks without any formal responsibility for those supervised (not a line supervisor)

**Formal**: performing supervisory tasks directed at those who are reporting directly to the position (a line supervisor)

**Direct**: supervision which requires immediate contact with those supervised (a line supervisor)

**Indirect**: supervision which is exercised through others (supervising supervisors) or through directives not immediately given to those supervised (a manager)

**Work unit**: the immediate work area or section providing a specific service(s), or program(s).

**Administrative unit**: an administrative or academic entity, typically a department or school. In some cases, this may apply to a small faculty or a component of a division such as Records Services within the Office of the Administrative Registrar, or the Grounds unit within Facilities Management.

**FACTOR 9 – IMPACT OF DECISIONS AND ACTIONS**

##### Definition

This factor assesses the impact or influence of actions and decisions for which the position is typically responsible.

##### Notes

**Impact or influence** may be on the users of the University’s services, on its financial, material, non-material, or human resources, or on the University’s environment, image, legal or safety obligations.

In assessing this factor, also consider any related responsibility for the safety of others (other than supervisory responsibility).

**Minor**  - of minor consequence, typically of short-term duration.

**Moderate** – of moderate consequences, typically of medium term duration.

**Major** – of major consequences, typically of long term duration.

**Work unit**: the immediate work area or section providing a specific service(s), or program(s).

**Administrative unit**: an administrative or academic entity, typically a department or school. In some cases, this may apply to a small faculty or a component of a division such as Records Services within the Office of the Administrative Registrar, or the Grounds unit within Facilities Management.

**Actions** may include preparing proposals or recommendations which form the basis of decisions.

**Collaborative involvement** in decision-making means participation on decision-making committees, or other joint processes for managing the work of the University.

**FACTOR 10 – INDEPENDENCE**

##### Definition

This factor assesses the degree of independence exercised, or freedom to act, in carrying out the responsibilities of the job. It assesses the extent to which independence is limited by established practices, procedures and policies. It also assesses the extent to which independence is limited by guidance, supervision and work review.

##### Notes

**Practices** are the methods, precedents or standards that govern the activities of a discipline.

**Procedures** are specific guidelines for activities within a discipline, such as those set out in manuals or established practices*.*

**Policies** are established boundaries within which practices and procedures can be employed. Policies are established through a process of approval and cannot be readily changed.

**Informed Guidance** is guidance that includes sufficient knowledge of the work so as to enable the provision of direction or assistance when required.

Senior Management: Typically, Dean, Executive Director, Vice-President.

**FACTOR 11 – PHYSICAL WORK ENVIRONMENT**

##### Definition

**This factor assessesthe extent to which the job involves exposure to disagreeable and/or hazardous physical working conditions*.* It also assesses the frequency of such exposure.**

##### Notes

In applying this factor, consider the frequency of *unavoidable* exposure to disagreeable or potentially hazardous physical conditions. It is understood that the University has an obligation to ensure health and safety guidelines are met and that no one is required to work in unsafe conditions which are avoidable.

**Little** - less than once a month

**Occasional** - once or twice a week, or a few times a month

**Frequent** – **several times** a day or **many** times a week

**Constant** – **the majority of the work time**

Conditions that occur quarterly or annually but last for several days or weeks should be considered Frequent.

**Unavoidable exposure** - inherent in the nature of the work (conditions cannot be improved)

**Disagreeable working conditions** are unpleasant or uncomfortable but not hazardous to life or health. Protective measures are optional and not required by safety regulations (e.g. cotton gloves, dust masks). Disagreeable conditions include:

|  |  |  |  |
| --- | --- | --- | --- |
| noise | noxious odours | humidity | adverse weather |
| heat | grease, oil | steam | overnight travel |
| cold | foul odours, fluids | vibrations | poor lighting |
| dust | isolation | fumes | excessive lighting |
| dirt | lack of privacy | lack of windows |  |

**Hazardous working conditions** expose the individual to risk of accident causing injury, illness, disease, disability or death. Protective measures must be taken in accordance with safety regulations. Hazardous conditions include dangerous substances, exposure to or use of the following:

|  |  |  |  |
| --- | --- | --- | --- |
| chemicals | biohazards | radiation | electricity |
| sharp instruments | heavy equipment | vehicles | hand and power tools |
| dangerous physical environments (heights, depths) | dangerous situations, including those involving physical aggression | human body waste or body fluids | wild animals |

**FACTOR 12 – ORGANIZATIONAL WORK ENVIRONMENT**

##### Definition

**This factor assessesthe extent to which the job involves exposure to adverse *non-physical* working conditions over which the individual has no control. It also assesses the frequency of such exposure**.

##### Notes

In applying this factor, consider the frequency of *unavoidable* exposure to adverse work situations which the individual has no opportunity to predict and/or control. It is understood that the University has an obligation to adopt sound management practices which ensure that work demands are not unreasonable and that no one is required to work in harmful conditions which are avoidable.

This factor does not measure the individual’s ability to cope with stress.

**Little** - less than once a month

**Occasional** - once or twice a week, or a few times a month

**Frequent** – **several times** a day or **many** times a week

**Constant** – **the majority of the work time**

Conditions that occur quarterly or annually but last for several days or weeks should be considered **Frequent.**

**Unavoidable exposure** - Conditions cannot be changed.

**Adverse non-physical working conditions** are conditions over which the individual performing the job has no control. Such conditions include:

* multiple demands which must be attended to on the spot
* constant unavoidable interruptions
* peak periods requiring an accelerated work pace or extended work hours
* short, frequent, multiple, variable or unpredictabledeadlines.
* situations involving conflict or difficult human situations, including verbal abuse or risk of physical aggression