



CUPE
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JEPE

**JOB EVALUATION/
PAY EQUITY PLAN**

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FACTOR 1 - COMPLEXITY AND JUDGEMENT

This factor is defined by two dimensions:

- A - COMPLEXITY
- B - JUDGEMENT

The factor is designed to evaluate the degree of difficulty inherent in analysing and developing solutions to job related problems which may be technical, administrative or operational in nature. The requirement to exercise independent judgement in so doing is also evaluated.

A - COMPLEXITY - refers to the

- frequency
- variety
- relative difficulty

of the tasks performed and the degree of analysis, creativity and innovation required. The requirement for originality and creativity in developing approaches, techniques or procedures for solving problems should be recognized.

NOTES:

- Creativity could include devising improvements and shortcuts, visualizing needs, devising and installing new systems, methods and procedures as an expected part of the job.

FACTOR I - COMPLEXITY AND JUDGEMENT

A - COMPLEXITY

DEGREE

1. Work primarily involves the performance of a limited number of clearly defined and/or highly repetitive tasks which are very similar in nature and directly related to each other. The need for analysis or problem solving is rare and incidental to the requirements of the position.

 2. Work primarily involves the performance of a limited number of specific routine tasks which incorporate a limited number of related steps, processes or methods. Selection of a course of action from a limited number of clearly defined and easily identified alternatives may occasionally be required for problem solving.

 3. Work primarily involves the performance of a variety of routine tasks which involve several related, standardized processes or methods. Some independent analysis and selection of a course of action from a limited range of alternatives is required for problem solving.

 4. Work primarily involves the performance of a variety of routine and non-routine tasks that occasionally require the application of different and unrelated processes and methods. Problem solving requires independent identification and analysis of the facts and components of the problem situation and selection of a course of action from a range of established alternatives.

 5. Work primarily involves the performance of a variety of routine and non-routine tasks that normally require the application of different and unrelated processes and methods. Problem solving involves treating a variety of conventional problems, questions or situations with established analytical techniques. (Occasionally developing alternatives).

 6. Work involves the performance of a variety of routine and non-routine tasks requiring the application of different and unrelated processes and methods. Problem solving involves some innovation and application of advanced analytical techniques to select an appropriate course of action.

 7. Work involves the performance of non-routine tasks that may require the application of specialized processes or methods. Problem solving involves interpreting considerable data/information or refining work methods, techniques and/or approaches to be used.

 8. Work involves investigating and resolving a variety of unusual conditions. Problem solving requires adapting analytical approaches and developing new information on the problem.

 9. Work involves isolating and defining unknown conditions, resolving problems and developing new approaches. Problem solving may require originating new methods or techniques and utilizing them in the development of new information. (Developing a new way to look at a problem).

 10. Work involves planning, developing and implementing vital programs. Problem solving requires continuing efforts to establish concepts, theories or programs to resolve unyielding problems.
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FACTOR I - COMPLEXITY AND JUDGEMENT

B - JUDGEMENT - refers to the extent to which the job is governed, supervised or regulated by:

- historical precedents
- specific instructions
- established methods
- documented procedures or policies
- availability, extent and nature of guidance from the immediate supervisor.

In evaluating this factor, consideration should also be given to the independence of action which is designed into the position i.e. that which would be exercised by a fully qualified performer with average tenure. The evaluation should not consider the independence which may be granted to a superior performer or an extremely experienced incumbent.

NOTES:

- Procedures and practices may also be considered as a form of supervision or review.
- Work review includes user review.
- Do not limit the degree because of the work review.

**FACTOR I - COMPLEXITY AND JUDGEMENT
B - JUDGEMENT**

DEGREE

1. Work is performed in accordance with detailed instructions providing very little freedom to exercise independent judgement. Work is closely controlled through the structured nature of the tasks involved. Difficulties and all deviations from specific instructions are referred to the supervisor who is normally available.

 2. Work is performed in accordance with established procedures and well-defined standard practices involving limited freedom to select which methods are applicable in any given situation. Virtually all work is checked frequently while in progress and upon completion for accuracy and completeness. Matters which deviate from specific work instructions are referred to the supervisor.

 3. Work is performed in accordance with established procedures and well-defined standard practices involving some freedom to select which methods are applicable in any given situation. Work is reviewed regularly while in progress and upon completion for accuracy and quality. Matters not covered in general work instructions are reviewed with the supervisor.

 4. Work is performed in accordance with standard practices and methods requiring initiative to complete recurring assignments independently and judgement to determine which of many methods are applicable in any given situation. Finished work is reviewed for accuracy and/or quality by immediate supervisor. Unfamiliar situations are referred to the supervisor.

 5. Work is performed within authorized limits prescribed by supervisor and/or policy. Exercises independent judgement in selecting and interpreting information, reconciling deviations from standard methods and resolving problems. Finished work is reviewed for attainment of overall objectives. Supervisor is available to assist in resolving problems.

 6. Work is governed by general policy requiring judgement and initiative in identifying, adapting and applying procedures and approaches to address unusual problem situations and resolve most conflicts. Finished work is reviewed only for attainment of objectives and effectiveness of results. Supervisor is involved on problems of major impact.

 7. Work is governed by broad guidelines requiring considerable judgement and initiative to interpret policy in planning and implementing major projects and work assignments. The process of policy implementation is reviewed for coordination with the work of others. Control is exercised only in terms of assessing attainment of broad directives.

 8. Work is performed in the absence of formal guidelines or precedents where resourcefulness and ingenuity are required to evaluate and develop policy in situations where considerable variation in interpretation is possible. Control is exercised only in terms of assessing attainment of organization goals.
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FACTOR 2 - IMPACT

This factor measures the positive and negative impact of the position on the organization and the public through actions and decision making.

This factor focuses on:

- potential gains or losses to the organization which includes work unit, section or department
- time, revenue or cost associated with acting on a decision
- consequence of success or errors in terms of direct benefits, cost or impact on public image.

NOTES:

- Remember, judgement is rated under Factor 1-B.
- Consider checks and balances which are in place and the likelihood of errors going undetected.

FACTOR 2 - IMPACT

DEGREE

1. Results are immediately obvious, problems are easily detected and cause little difficulty or loss of time to correct.

 2. The impact is easily and quickly discerned. Problems result only in minor confusion, delay or expense to correct. (Minimal positive or negative effect on the organization.)

 3. The impact requires some examination or review to determine outcome. Results in work flow disruption, rework or limited waste of resources within a department. (Limited positive or negative effect on the organization.) (Recommendations may have short term impact.)

 4. Results are detected after the fact. May interrupt and delay work output, moderately waste resources. May affect other departments. (Moderate positive or negative effect on the organization.)

 5. May result in significant interruption and delay in work output or service and waste resources. May affect other departments and have some influence on operations. (Measurable positive or negative effect on the organization.) (Recommendations may have long range influence.)

 6. May result in significant gains or losses and continuing influence on operational effectiveness. Revenue, productivity, service or security of assets may be affected. (Significant positive or negative effect on the organization.)

 7. Often results in permanent gains or losses extending over long periods. (Major positive or negative effect on the organization in terms of revenue, costs, delays or attainment of organization goals.)

 8. Actions may positively or adversely affect long term growth and financial stability of the organization. (Critical and lasting positive or negative effect on the organization.)
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FACTOR 3 - RESPONSIBILITY FOR OTHERS

This factor is defined by two dimensions:

- A - NATURE OF WORK SUPERVISED
- B - NUMBER OF PERSONS SUPERVISED

The factor measures the nature and scope of supervisory responsibility as well as functional advice and guidance. This applies to positions who have control responsibilities for employees and contract workers.

A - NATURE OF WORK SUPERVISED - refers to the type and degree of control over the work of others. There are different types of supervision described as work guidance, work direction and full supervision:

Work Guidance: provide information or instructions on completing tasks which are similar to those in the incumbent's position.

Work Direction: coordinate and review the work of others who officially report to another position in the department. May also be requested to comment on work performance for input to appraisals.

Full Supervision: assign and schedule the work of others: responsible for making decisions on performance appraisals, training and development for employees.

NOTES:

- The evaluation should reflect the highest degree which normally applies.
- If evaluated at degree I - 4, or the light side of "OR", the score for Factor 3B is automatically 1.
- For positions with supervisory responsibilities, refer to the left side of the "OR"; if the position has no supervisory responsibilities, but is required to provide functional advice and guidance, then refer to the light side of the "OR".
- Supervision of work performed by Contractors, use right side of "OR".
- "Technical" advice is the **how to do** something.
- "Functional" advice/guidance means giving conceptual advice to employees.

FACTOR 3 - RESPONSIBILITY FOR OTHERS
A - NATURE OF WORK SUPERVISED

DEGREE

1. No responsibility for providing training, guidance or work direction to other personnel. May occasionally demonstrate work methods to employees.

 2. Intermittently instructing similarly employed personnel on job content or work methods and procedures, while continuing to perform normal day to day duties.

 3. Regular responsibility for providing training and/or work guidance to others while continuing to perform the normal day to day activities of the position.

 4. Responsibility for assigning, checking and maintaining work flow of staff within a work unit as a group leader while continuing to perform normal day to day duties [OR work involves providing technical (assignment) guidance to employees in own and/or other work units working on related assignments while continuing to perform normal day to day duties.]

 5. Responsibility for full supervision of personnel performing similar activities [OR work involves providing functional advice and guidance related to standard procedures to individuals outside the immediate work unit.]

 6. Responsibility for full supervision of personnel performing diversified activities or supervising supervisors of similar activities [OR work involves providing functional advice and guidance with some control responsibilities for maintaining standards.]

 7. Responsibility for providing supervision to subordinate and supervisory personnel performing diversified activities, may have emphasis on policy formulation and management-by-exception while providing more latitude and discretion to subordinates, [OR work involves providing functional advice and guidance with full control responsibilities for establishing and maintaining standards.]

 8. Work involves integrating various organizational areas including both line and/or staff positions, or one major organizational area. This includes overall approval of area by area planning, objective setting and policy making.

 9. Work involves integrating, at the most senior level, the activities of various organizational areas. Gives general direction on overall strategy formulation, planning and organization objective and policy setting.
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FACTOR 3 - RESPONSIBILITY FOR OTHERS

B - NUMBER OF PERSONS SUPERVISED - refers to the total number of personnel supervised directly and through subordinates.

NOTES:

- For individual positions with no continuing supervisory responsibilities, the appropriate score is Degree 1.
- Less than full time positions are converted to full time equivalents (FTE) for the purposes of rating this factor.

Degree	Number of Persons Supervised
1	None
2	1 - 5
3	6 – 10
4	11 – 15
5	16 – 25
6	26+

FACTOR 4 - CONTACTS

This factor measures the communication skill required and the responsibility for responding to, establishing or maintaining direct, two way relationships with other staff and external contacts.

The factor focuses on:

- the requirement to obtain or communicate information
- the reason for the contact
- the requirement to initiate contacts
- the requirement to listen to others and to identify with their needs
- the ability to establish rapport and foster trust
- the requirement to influence the behaviour of others
- the need for tact, diplomacy and persuasiveness to achieve results
- the need to provide emotional support

Raters should consider the primary contact role of the position - does it involve:

- responding to contacts initiated by others
- maintaining established, ongoing contacts
- establishing contacts where none have previously existed

This factor does not include normal supervisor-subordinate communication.

NOTES:

- "External Contacts" means outside the organization (CRD).
- In determining extent of counselling, consider the length of time for counselling (significant would include being able to prepare and plan a course of action and limited would include concern for immediate well being without the time to prepare a course of action.)

FACTOR 4 - CONTACTS

DEGREE

1. Contacts are of a routine nature within the organization and require basic communication skills. External contacts are incidental/infrequent and require common courtesy.

2. Work involves contacts for the purpose of providing or obtaining routine information. Common courtesy and tact are required. External contacts are of a routine nature.

3. Work involves contacts for the purpose of explaining routine job matters such as how information was collected or to coordinate internal work and services. External contacts can be for the purpose of providing or gathering information and explaining job matters. Limited caring or nurturing.

4. Work involves contacts for the purpose of discussing routine and non-routine job matters including how information was collected or processed or to correct a breakdown in the flow of information. External contacts can be to coordinate services or the flow of information. Contacts may involve facilitating problem solving. Limited counselling.

5. Work involves contacts for the purpose of obtaining information, providing guidance, instruction or technical advice. Contacts can involve influencing the behaviour of others. External contacts can involve identifying alternatives and providing general advice in problem solving. Moderate counselling.

6. Work involves contacts for the purpose of policy development or problem solving with respect to matters of considerable importance to the organization requiring tact and persuasiveness and/or influencing others where guidelines may not exist. External contacts can involve giving direction and for intervening in a crisis. Significant counselling.

7. Work involves contacts for the purpose of shaping opinion and securing the understanding, cooperation or agreement of others who may not be readily disposed to cooperate on matters which make a significant contribution to the goals of the organization. Requires extraordinary diplomacy and persuasiveness to obtain the cooperation of others.

FACTOR 5 - WORKING CONDITIONS

This factor is defined by these dimensions:

A - EFFORT

- AI - PHYSICAL EFFORT
- A2 - MENTAL EFFORT
- A3 - VISUAL AND AUDITORY EFFORT

B - WORK ENVIRONMENT

This factor measures the extent of physical, mental, visual and auditory demands inherent in the job, and the degree of exposure to unpleasant or hazardous working conditions. This factor also considers the frequency/regularity of occurrence.

Frequency is calculated on the length of the position's normal shift.

Frequencies less than 20% are considered infrequent or occasional.

AI - PHYSICAL EFFORT - refers to the nature and frequency of physical exertion or strain normally required to perform the job. Physical effort is intended to measure the level of fatigue caused by work related tasks and duties. It includes fine and gross motor skills.

NOTES:

- Physical fatigue can be caused by actual physical effort, e.g. lifting and loading boxes or other heavy objects.
- Physical fatigue can also be caused by the opposite, the inability to move away from a fixed setting or standing position for prolonged periods.
- Must be a requirement of the position.
- KEYSTROKING: = using both hands and all fingers
 - = touch typing
 - = hunt and peck
 - = using computer for E-mail or electronic calendar
- WEIGHTS:
 - Light - under 5 kg (11 lb.)
 - Medium - over 5 up to 10 kg (22 lb.)
 - Heavy - over 10 kg

FACTOR 5 - WORKING CONDITIONS
A1 - PHYSICAL EFFORT

DEGREE

1. Work does not require unusual physical effort and/or dexterity, strain or unusual positions e.g. intermittent standing, sitting, walking on level and even surfaces, with freedom to move around. Keystroking does not require a technical aptitude.

2. Work requires light level physical effort and/or dexterity e.g. prolonged standing or sitting with limited freedom of movement, walking on uneven surfaces, climbing stairs, using and handling lightweight (under 5 kg) equipment and materials, arms extended in unsupported position touch-keying on calculator, low speed keystroking.

3. Work requires moderate level physical effort and/or dexterity e.g. using or moving medium weight (5-10 kg) equipment or materials, reaching overhead, bending/stooping, lifting babies and/or small children, moderate speed keystroking working from ladders, weeding, vacuuming and sweeping.

4. Work requires high level physical effort and/or dexterity e.g. using heavy weight (over 10 kg) materials or equipment requiring straining, shovelling rocks or soil, pulling or pushing occupied wheelchairs, lifting patients, placing concrete or large stones, high speed keystroking.

FREQUENCY TABLE	
Degree	Description
3	21 – 40% Often
4	41 – 70% Frequent
5	71 – 100% Continuous

FACTOR 5 - WORKING CONDITIONS

A2 - MENTAL EFFORT - refers to mental fatigue or stress resulting from work related tasks and duties. Frequency identifies the extent to which this mental effort occurs.

NOTES:

- The adverse effects of a number of work situations should be considered in evaluating positions:
 - working in situations where the employee has no control over work flow
 - working with frequent or multiple work schedules or deadlines where there is a consequence if they are not met
 - intense periods of mental concentration
 - nature and frequency of interruptions
 - being required to solve problems or negotiate an outcome where there is a continuing expectation that the requirements of the organization will be met
 - dealing with negative comments or complaints as a requirement of the position

**FACTOR 5 - WORKING CONDITIONS
A2 - MENTAL EFFORT**

DEGREE

1. Nature of work does not require unusual concentration and is not likely to result in unusual levels of stress or fatigue.

 2. Low level job stressors include short periods (one or two hours) of intense concentration or concentrating on meeting moderately demanding work schedules and/or some interruptions, deadlines, multiple tasks.

 3. Moderate level job stressors include long periods (two to four hours) of intense concentration or concentrating on meeting considerably demanding work schedules and/or frequent interruptions, deadlines, multiple tasks.

 4. High level job stressors include extended periods (more than four hours) of intense concentration or concentrating on meeting extremely demanding work schedules, constant interruptions deadlines multiple tasks.
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FREQUENCY TABLE	
Degree	Description
3	21 – 40% Often
4	41 – 70% Frequent
5	71 – 100% Continuous

FACTOR 5 - WORKING CONDITIONS

A3 - VISUAL AND AUDITORY EFFORT - refers to the nature and frequency of periods of visual and/or auditory concentration normally required to perform the job. Visual and/or auditory effort measures the level of fatigue caused by work related tasks and duties. Frequency identifies the extent to which this effort occurs.

NOTES:

- Visual effort may include focusing on VDT screens, printed materials or small objects requiring visual concentration. Visual effort may also include watching or observing, e.g. lifeguarding.
- The fact that positions have a VDT on their desk or perform keyboarding does not automatically mean that fatigue from visual effort is involved. The extent to which the position must continuously focus on and utilize the VDT screen is the important issue.
- Auditory effort may include listening for sound variations or dictaphone typing.
- Auditory concentration refers to a function of the job, not the job environment.

FACTOR 5 - WORKING CONDITIONS
A3 - VISUAL AND AUDITORY EFFORT

DEGREE

1. Nature of work does not require unusual visual and/or auditory concentration and is not likely to result in unusual stress or fatigue.

 2. Low level stressors include visual and/or auditory concentration or focusing on small areas such as monitors, instruments microfiches, printed material or other similar objects for short periods (one to two hours).

 3. Moderate level job stressors include visual and/or auditory concentration focusing on small areas or objects such as dictaphone for long periods (two to four hours).

 4. High level job stressors include visual and/or auditory concentration or focusing on small areas or objects for extended periods (more than four hours).
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FREQUENCY TABLE	
Degree	Description
3	21 – 40% Often
4	41 – 70% Frequent
5	71 – 100% Continuous

FACTOR 5 - WORKING CONDITIONS

B - WORK ENVIRONMENT - refers to the location and conditions usually associated with the work of the position including exposure to physical hazards or other adverse working conditions.

NOTES:

- Injury means "time-loss injury".
- Possibility of injury can include exposure to chemicals, knives, sharp objects and working alone in an office.
- Some conditions are operational and can be fixed, the plan does not recognize these, e.g. poor heating.
- Minor disagreeable elements may include accessibility of the public and restricted freedom to move from work station.

**FACTOR 5 - WORKING CONDITIONS
B - WORK ENVIRONMENT**

DEGREE

1. Work environment does not involve disagreeable elements or exposure to job hazards e.g. incidental driving.

2. Work environment involves minor disagreeable element(s) e.g. working outside, driving, building renovation site, dealing with difficult people over the telephone and in person.

3. Work environment involves moderately disagreeable element(s) and/or exposure to job situations where there is some possibility of injury or concern for personal safety, e.g. unaccompanied visits to patient's homes, presence on construction site, working in traffic, dealing with difficult, hostile, abusive people in person.

4. Work environment involves significantly disagreeable element(s) and/or exposure to job situations where there is a possibility of injury e.g. working on construction site, working around moving heavy equipment or working from boats.

FREQUENCY TABLE	
Degree	Description
3	21 – 40% Often
4	41 – 70% Frequent
5	71 – 100% Continuous

FACTOR 6 - KNOWLEDGE

This factor refers to the combination of formal education, training, and practical experience required to attain the knowledge, skill and ability required to perform the job satisfactorily. It recognizes that there are equivalencies between varying levels of formal education and training and practical, progressive experience. Training may be from a number of professional or academic sources. If additional licenses, certificates, and courses are required, include the time required to obtain them in experience.

NOTES:

- Trades Qualification (TQ) apprenticeship is considered to be experience rather than formal education. Class time required to complete apprenticeship should be given credit with additional experience.
- Cumulative experience is not only the time in a previous position, it is the total of all prior work experience required to attain that previous position.
- Must meet all the criteria to get the degree.
- Undergraduate is 4 years (BA, BSc)
- Graduate is 5-6 years (Masters)
- Accounting Designations (CA CGA, GMA) equivalent to UG and 3 years' experience.

FACTOR 6 - KNOWLEDGE

Degree	University Degree Or 4 year program Technical School Diploma (UG – Undergraduate) (G – Graduate)	Community College or Technical School Certification Trades		High School	Partial High School
		2 – 3 year program	1 year program		
1					PHS up to 2 yrs
2				HS Grad up to 1 yr	2 yr
3				1 yr	3
4			0 – 6 months	2	4
5		0 – 6 months	7 mo – 2 yr	3 – 5	5 – 7
6		7 mo – 2 yr	3 – 5	6 – 8	8 – 10
7	UG 0 – 2 YR	3 – 5	6 – 8	9 – 11	11+
8	UG 3 – 5 G 0 – 2	6 – 8	9 – 11	12 – 14	
9	UG 6 – 8 G 3 – 5	9 – 11	12 – 14	15+	
10	UG 9 – 11 G 6 – 8	12 – 14	15 – 17		
11	UG 12 – 14 G 9 – 11	15 – 17	18 – 20		
12	UG 15 – 17 G 12 – 14	18 – 20			