



Town of Oakville and CUPE Local 1329
Joint Job Evaluation Guide

About this Guide

The purpose of this guide is to provide a general overview of the job evaluation process and the method used to evaluate CUPE Local 1329 positions at the Town of Oakville. While it outlines the roles and the required tools, it is not intended to be a definitive interpretation of specific cases or issues.

Through the job evaluation process, we can reach our collective goal of determining the rank and classification of CUPE Local 1329 jobs in a fair, consistent and equitable manner.

Resources to Help You

If you need any assistance at any time, additional resources are available:

HR Consultants

Online Reference Materials:

Visit: www.oakville.ca

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Job Evaluation: A Tool for Effective Management

Job evaluation provides the formula for determining how jobs fit together and where they fit into the pay scale. The purpose is to assess – consistently and without bias – the relative value of permanent full time CUPE Local 1329 jobs within the Town of Oakville, thereby establishing and maintaining internal equity and fair compensation packages.

It is also the key tool used to achieve compliance with the *Pay Equity Act*, which came into effect in Ontario in 1987 and is based on the principle of “Equal pay for Work of Equal Value.” It is in place to ensure that comparable jobs receive like compensation.

Job evaluations measure the following four job factors outlined in the Pay Equity Act:

- Skill
- Effort
- Responsibility
- Working conditions

It is intended to measure new job functions or significant and permanent changes to existing job functions, focusing on evaluating the job itself. It is not designed to measure personal attributes or qualifications of the employee, nor is it intended to assess performance, seniority, confidentiality or volume of work.



A well-maintained job evaluation process requires up to date job descriptions which have the additional benefit of allowing an organization to:

- Clearly communicate work objectives to employees
- Identify employee training needs
- Prepare accurate postings for use in the recruitment process
- Develop accurate models for succession planning

When Is Job Evaluation Required?

- A brand new position is created
- There are significant changes in the nature of the duties required in an existing job
- The nature of work has changed, requiring major changes in qualifications
- The job has changed as the result of a successful appeal or arbitration award
- When there is concern that a job evaluation result may no longer be relevant

When Is Job Evaluation *Not* Required?

- The volume of work has changed, but the complexity has not
- The job description requires minor changes; some duties are added or deleted but the nature of the role is maintained
- The title of the position has changed, with no change of duties
- Higher level duties have been assigned for a temporary period of time. An acting allowance may be considered in this case, as per the Collective Agreement
- Employee performance is outside the expected norm- either exceptional or below standards
- When an employee has undertaken work voluntarily, without formal agreement or approval of the supervisor. If voluntary duties are not an integral part of the job, the performance of such duties should cease. If in fact they do represent a significant change to the job, a re-evaluation of the job should be sought.

The Job Evaluation Process

Initiation

A manager may initiate a review when:

- A new position has been created and approved through the budget process or position changes are planned for the future that include adding or eliminating responsibilities to an existing role, or adding a new job function to the department or
- There have been significant changes in the nature of an existing job, either resulting from individual triggers or a departmental reorganization. New duties have been added or there have been significant changes to the existing job duties.

AND

- It has been determined that the organization can support role changes including absorbing any related financial impact. If the finances related to a job change cannot be accommodated by the department, an alternative means of completing the work must be considered. The manager identifies a need for a new position or the manager and or job incumbent identifies changes to an existing position, based on organizational needs.

An employee may initiate a review when:

- He/ she believe that the duties being performed are significantly different from those identified in the current position descriptions/ documents and change the level of complexity. This provision is described in the collective agreement.

Execution

- The position description questionnaire (PDQ) is initiated by the incumbent(s), the immediate supervisor or jointly by the incumbent(s) and the supervisor, as appropriate to the situation
- Upon completion it is reviewed by the Director, who will acknowledge receipt of the PDQ in writing and forward a copy of this acknowledgement to Human Resources
- The director reviews proposed changes with HR (corporate perspective) and, if satisfied directs manager to forward to HR
- Or
- If the revised PDQ does not accurately describe the position in the judgment of the Director and he/she will not approve the documentation, then the affected parties in the case of an occupied position are to be so advised at an early date but no later than 3 months from the time the PDQ was generated;
- If HR deems that there is not sufficient change to warrant committee review, they will communicate and meet with CUPE Local 1329;

- When the documentation is finalized and if it is endorsed by the Director, Human Resources, HR staff will log the information and track the status of the job evaluation process. Final documents must include a draft Job Posting, a completed PDQ and, if applicable, a Job Evaluation Request Form;
- The incumbent and the supervisor are to be advised of the progress of the PDQ throughout the evaluation process;
- All documentation must be submitted to Human Resources electronically and in hard copy with required signatures;
- A revised organization chart, if appropriate, should be attached to the position description
- Consultation and mutual assistance between Human Resources and the organization at all levels is expected, encouraged and facilitated by this arrangement.

Process Timing

New and Existing Positions

- The timing for the job evaluation to meet to review a PDQ is a maximum of six weeks from the date that all completed, authorized, documentation is received in Human Resources.

Reorganizations

- During reorganizations a number of positions are normally evaluated simultaneously in advance of the approved effective date. The actual length of time to complete the evaluations varies depending on the number of positions. HR will inform CUPE 1329 of ongoing status during reorganizations.

Evaluation – Factors & Ratings

- Provided that the new position or changes to an existing position are approved the document(s) are queued for evaluation by the Joint CUPE Local 1329 Job Evaluation Committee (JJEC)
- CUPE Local 1329 positions are jointly evaluated using a point- factor job evaluations plan, containing factors and sub factors that are appropriate for assessing the work and for meeting the legislative requirements of the Pay Equity Act. The JJEC conduct evaluations in accordance with established terms of reference.

The factors are:

Education
 Experience
 Complexity of Work
 Physical and Visual Demands
 Accountability
 Supervisory Responsibility
 Impact
 Contacts with Others
 Environmental Working Conditions
 Work Pressure and Stress

Job ratings will:

- Provide the basis from which to gauge equitable wage rate relationships between the jobs.
- Group jobs having relatively equivalent point values to the Town into the same grade.
- Form the foundation from which to measure changes in job content.
- Enable the assignment of jobs into the appropriate wage grade in the salary grade structure.

In the application of the job evaluation rating manual, the following general rules apply:

- It is the content of the job that is being analyzed, not the individual doing the job
- Jobs are to be evaluated without regard to an incumbent's performance or existing wage rates
- Jobs are placed in the appropriate level in each factor by considering the specific requirements of the job, the factor definition and the description of each factor level

- Any time a position is reviewed, the impact of change to other positions is also considered. In certain situations, it will be necessary to review and update more than one position in a department in order to achieve a desired new structure. In some cases, a unit or departmental reorganization may be required
- Workload is not a consideration when evaluating a job
- Factor assessment is based on normal or average occurrences on the job and not on unusual or extreme circumstances

Implementation

- The Chair communicates the final results of the job evaluation to all parties, and HR implements changes to position and employee records, updates pay information and processes pay changes as applicable
- As per the collective agreement, if a change in job content or requirements result in a lower evaluation and wage grade for a job, the incumbent(s) of such a job whose existing wage is at the top of the new wage grade shall be identified as “red circled”, until that particular incumbent vacates the position by obtaining another job in the organization, he/she retires, obtains a job outside of the organization or the job rate matches the red circled rate of pay.
- If the job is vacant or new then the job will be placed into the appropriate job grade that was evaluated by the JJEC effective immediately.
- If the job is occupied the assigned wage grade shall become effective from the first pay period following the job evaluation meeting and retroactive pay dated when the approved documentation was submitted to Human Resources.

Appeal

New Positions:

- Incumbent(s) must perform the duties of a newly created position for at least six (6) months before an appeal can be submitted to the Committee with regards to the job description and/or rating.
- The appeal must state in writing, why the incumbent(s) disagree with the job description and/o rating for the position **and must be made within 1 year of the new position rating**. The JJEC’s decision will be final and binding on both parties.

Existing Positions:

- No later than 30 days following receipt of notification of the results of job evaluation, an incumbent and/or his/her manager **may** appeal the ranking of his/her position provided that:
 - a) The appeal contains significant information not included on the original submission;
 - and
 - b) Supplemental information does not include changes to the education or experience requirements of the position.
- The incumbent and/or his/her manager will submit a letter of appeal to their respective Director outlining any additional information not included on the original submission that would support why the job should be re-examined
- The Director will comment on the letter of appeal and forward the letter and comments to Human Resources for review with the Union.
- The appeal will be placed on the next available job evaluation agenda to be reviewed by the Job Evaluation Committee.
- The decision of the Job Evaluation Committee will be final and binding and any further review of the position as initially presented throughout the appeal cannot be undertaken until twelve (12) months have elapsed from the date of the formal appeal review, and then only if significant material changes have occurred.

Roles and Responsibilities

Role	Responsibility
Manager	<ul style="list-style-type: none"> • Prepares draft list of duties, completes or updates a PDQ, revises job description, reviews organizational structure and gains initial approvals to proceed • Acknowledges receipt of any employee generated PDQ to the employee and informs Human Resources of receipt • Reviews the document with the director and if approved in principle sends the PDQ to HR • Initiates and participates in discussions with the Human Resources Consultant – Compensation (Committee Chair) • Ensures that final approved documentation is authorized by the Director and sends the PDQ to HR to be scheduled for evaluation (within 3 months of receipt) • Ensures that the process is conducted within the guidelines stipulated in the collective agreement
Employee	<ul style="list-style-type: none"> • May request a review of their position • For employee generated requests must provide details of job changes to their supervisor as a written summary. This summary must include new accountabilities, accountabilities that have been deleted and accountabilities that have been transferred to another position.
Senior Management (Director)	<ul style="list-style-type: none"> • Reviews proposed changes with HR (corporate perspective) and, if satisfied directs manager to forward to HR or • Does not agree and communicates with employee and HR
Human Resources Consultants	<ul style="list-style-type: none"> • Provides advice and consultation regarding job evaluation, reorganization processes and collective agreement obligations to client departments • Provides support in the completion of the PDQ and Job Evaluation Request form
Human Resources Consultant (committee chair)	<ul style="list-style-type: none"> • Provides support for the completion of the PDQ – serves as subject matter advisor to employees and management • Reviews submissions from a corporate perspective and then initiates any required discussion with management prior to management determining if the submission will be queued for evaluation • Meets with CUPE Local 1329 President when PDQ's are not going forward • If no consensus the document will be scheduled for job evaluation • Coordinates and chairs joint job evaluation meetings and provides final documentation • Distributes documentation to management, employee, HR and CUPE to advise of final
Human Resources	<ul style="list-style-type: none"> • Updates or establishes employee records and implements employee salary changes
Joint Job Evaluation Committee	<ul style="list-style-type: none"> • Evaluates scheduled CUPE Local 1329 positions in accordance with JJEC Terms of Reference.
HR & CUPE 1329	<ul style="list-style-type: none"> • If consensus is not reached the Director of Human Resources and the President CUPE Local 1329 will decide the outcome; • If a decision cannot be made internally the matter will be referred to a mutually agreed upon third party.

Joint CUPE 1329 Job Evaluation Committee

The following outlines the purpose, composition, roles and responsibilities, terms of reference and operating procedures for the Joint CUPE Local 1329 Job Evaluation Committee (JJEC).

Purpose/Mandate

The Joint CUPE Local 1329 Job Evaluation Committee is responsible to:

- Maintain a comprehensive knowledge of the job evaluation process;
- Evaluate new or revised position questionnaires;
- Maintain the confidentiality of information received and dealt with by the Committee.

Membership

The committee comprises six (6) members: 3 from CUPE Local 1329 and 3 from management;

- The Director of Human Resources will determine the final management membership of the committee; the President of CUPE Local 1329 will determine the union membership of the committee;
- Should a committee member resign from the committee, every effort should be given to provide reasonable notice;
- A committee member may be removed from the committee through a joint decision of the Director, Human Resources and President of CUPE Local 1329;
- The Director of Human Resources will approve the appointment of new non-union members to the Committee over time;
- Human Resources will be responsible for ensuring the transition of Committee members and will provide training to maintain ongoing evaluation expertise;
- The Committee Chair attend each meeting as facilitator to support the Committee by recording results, rationale and managing documentation.

Committee Chair and Quorum

- The Human Resources Consultant – Compensation, will chair the Committee, but will not be a voting member of the Committee.
- The Director of Human Resources shall appoint a designate when the regular chair is unable to attend;
- A quorum of 4 members (2 CUPE 1329 and 2 management) the Chair is required to conduct evaluation business.

Committee Chair

- Manages the CUPE 1329 Job Evaluation process and implements improvements to the process as recommended by Committee member but will not be a voting member of the committee;
- Coordinates meeting dates and times ensuring quorum attendance;
- Develops and maintains internal HR systems and processes to support the job evaluation process and maintains all records and information;
- Chairs Job Evaluation Committee meetings but will not be a voting member of the committee;
- Serves as subject matter advisor to employees and managers;
- Receives all requests for evaluation, re-evaluation and consideration and reviews information to ensure accuracy, completeness and compliance with request submission guidelines prior to submitting the job questionnaire for evaluation;
- Reviews submissions that are deemed to have no change from the existing PDQ together with the President of CUPE Local 1329;
- Gathers additional job information and/or arranges attendance by managers at the meeting to clarify information as requested by the Committee;

- Ensures that all results are communicated;
- Coordinates and assists with training of Committee members;
- Manages the transition of Committee members.

Terms of Reference

- Committee meetings will take place during normal business hours;
- Initial evaluation of all positions will require the commitment to a block of time as scheduled by the Chair;
- Subsequent meetings will be scheduled as required;
- Committee members will be provided adequate time to prepare for evaluation meetings;
- All Committee members will receive training to fulfill their roles;
- All Committee members will be provided with the Joint CUPE Local 1329 Job Evaluation Manual;
- All material must be returned at the end of the Committee member's term;
- The Committee will make its decisions by consensus and not by majority vote;
- If consensus cannot be reached within a reasonable amount of time, the Committee Chair will arrange for additional information and endeavor to facilitate consensus;
- If consensus is still not reached the Director of Human Resources and the President CUPE Local 1329 will meet to decide the outcome;
- Committee members are subject to conflict-of-interest processes and must not participate in the evaluation/re-evaluation of their own jobs or jobs reporting directly to them. They may take an advisory role to the Committee for jobs in their department (excluding their own) but will not participate in determining the evaluation;
- The member designated as chair, will also maintain voting privileges in the proceedings;
- Prior to a Committee meeting, Committee members will independently review each job questionnaire and be prepared to recommend/discuss factor scoring for each job coming before the Committee;
- The Committee, or a Committee member may request, through the Committee Chair, written clarification of information from the manager to whom the job reports. Jobs for which information is not received on time will be deferred to another meeting;
- The Committee, or a Committee member may request, through the Committee Chair that the manager to whom the job reports attend the Committee meeting to answer questions about the submission;
- Once the Committee has reached consensus on the ranking of each job factor, a job class scoring form will be completed detailing the factor scores and rationale for each score. The Committee Chair will document the scores and rationale;
- Human Resources will maintain a current database of all results and documentation.
- Human Resources will provide, on an ongoing basis, an up-to-date list of current job evaluation results.

Glossary of Terms

Job Evaluation

A process for determining the relative worth of a position to an organization. It involves studying and analyzing a job to obtain information about the content of the job, the preparation of a job description and the rating of the job by use of a rating system.

Employee

An employee of the Town of Oakville in the bargaining unit for which Local 1329 is the recognized bargaining agent as defined in the Collective Agreement.

Factors

The major criteria, i.e. skill, effort, responsibility and working conditions, etc. as set out in the Rating Manual to measure all jobs covered by this Job Evaluation Program.

Factor Degrees

The actual measurement levels within each factor.

Red Circled

The wage rate an employee is receiving that is in excess of the wage rate that has been established for the job in accordance with the Job Evaluation Program.

Incumbent

An employee who has been hired into or promoted to a job on a permanent basis. (An employee is an incumbent in one job only).

Job

A group or range of duties or tasks assigned to and performed by the incumbent(s).

Job Analysis

The process of determining and recording the tasks and duties comprising a job and the required knowledge, responsibility, effort and the working conditions involved in the performance of that job, through the use of questionnaires, observation and interviews.

Job Description

The official record of the principal tasks, duties of a job and qualifications required.

Job Rating

The selected degree levels, points, reasons for the job rating and total points established for a job in accordance with the Rating Manual.

PDQ

Position Description Questionnaire - An information collection tool used to gather information regarding the various aspects of a role such as major responsibilities, qualifications and details related to specific factors that are measured in job evaluation. The document is also used as:

- an orientation tool for new employees
- a tool for planning organizational change
- an opportunity to highlight changes that occurred to job duties since the last evaluation

Point-Factor job evaluation

A set of compensable factors as outlined in the Pay Equity Act with assigned point ratings that determine the value of jobs. The factors are skill, responsibility, effort and working conditions. Each factor has multiple levels that have corresponding points assigned. The tool that sets out the factor levels along with the assigned points is called the Rating Plan. The points for each factor are summed to form a total point score for the job. The total points determine the position grade.

Reclassification

A term for the process whereby a position changes as a result of organizational requirements (e.g., reorganization of department/unit, reassignment of duties, etc.) and a re-evaluation of the position results in a change in grade level.

Points

The numerical expression adapted for measurement of each degree within each factor.

Total Points

The sum of all points allotted to each job for all factors as determined in accordance with the Rating Manual.

Joint Job Evaluation Committee (JJEC)

The Joint Job Evaluation Committee appointed by the respective parties to deal with matters relating to the rating of jobs.

Wage Grade

The designation in the Wage Rate Schedule for a particular salary level or salary range as per established points.

Point Parameters Related to Pay Grades

GRADE	POINT SPREAD
1	300-349
2	350-399
3	400-449
4	450-499
5	500-549
6	550-599
7	600-649
8	650-699
9	700-749
10	750-799
11	800-849
12	850-899
13	900-949