



THOMPSON RIVERS
UNIVERSITY

***Support Staff
Job Evaluation
Maintenance Manual***

***Thompson Rivers University
and
CUPE Local 4879***

April 2018

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Article 1 Introduction

- 1.1 As part of the Collective Agreement between the Thompson Rivers University Board of Governors and the Canadian Union of Public Employees, Local 4879, a provision was made in Article 24 to establish a Job Evaluation Committee.
- 1.2 The purpose of this manual is to outline the procedures for the maintenance of the job evaluation program in accordance with the general objectives and principles set out in this agreement pertaining to a job evaluation program between the Parties.
- 1.3 To jointly maintain the job evaluation plan for all jobs within CUPE Local 4879.
- 1.4 Job Evaluation is the technique which determines the ratings of the jobs being performed. It evaluates the job functions using a point system. The process involves the analysis and rating of jobs using the job description and a job information questionnaire against a rating scale.

Article 2 Definitions

The following definitions are to apply to the terms used within the Job Evaluation Manual and throughout the job evaluation program:

Collective agreement	The collective agreement currently in effect between the Thompson Rivers University and CUPE Local 4879.
Degree level	The actual measurement level within each subfactor.
Duty	Is made up of a number of tasks.
Factors	The four major criteria used to measure jobs are skill, effort, responsibility and working conditions.
Gender-neutral	Any practice or program which does not discriminate between men and women.
Incumbent	An employee assigned to a job.
Job	Is made up of a collection of duties and responsibilities.
Job analysis	The process of determining and recording the tasks and duties of a job and the required skill, effort, responsibility and working conditions involved in the performance of that job, through the use of questionnaires, interviews and workplace observation.
Job Evaluation Questionnaire	The tool used to collect and record job data which forms part of the job related documents.
Job description	The written description of a job, which includes a summary, and a listing of the major duties and responsibilities.
Job evaluation	A process which determines ratings of jobs in relation to each other; this rating is expressed in points.
Job Evaluation Plan	A measuring tool used to rate jobs. It contains subfactor definitions with corresponding degree levels and notes to raters.
Joint Job Evaluation Committee	The Committee is made up of equal representatives from union and management and is responsible for the maintenance of the job evaluation program.

Maintenance	The ongoing upkeep of accurate job descriptions and job ratings based on the Job Evaluation Plan.
New job	A job which is added to the workforce that is sufficiently different from work currently being performed in the workplace that it cannot be assigned to an existing job.
Pay grade	A designated salary range within the salary schedule including increments, if any.
Points	The numerical expression assigned to each degree level within each subfactor.
Position	Is a collection of duties and responsibilities assigned to one person.
Rating	The process of relating the facts contained in the job documents to the job evaluation plan and selecting the factor degree levels judged to be appropriate.
Rating sheet	Records the facts and rationale for the degree levels assigned to each subfactor for each job.
Reclassification	A significant change in the skill, effort, responsibilities or working conditions of a job which may or may not affect its total point value or pay rate
Red-circled rate	The incumbent's wage rate that is higher than the newly established wage rate.
Salary schedule	A listing of job titles, point bandings and pay grades.
Sore-thumbing	The process of making an objective comparison of a rating decision made by the committee to previous rating decisions of similar and/or related positions. Comparisons may be performed by subfactors and/or total points.
Subfactors	Are components of the four major factors.
Tasks	A unit of work activity that forms part of a duty; one of the operations that constitute a logical and necessary step in the performance of a duty.
Total points	The sum of all points allocated to each job for all subfactors determined in accordance with the job evaluation plan.

Article 3 Joint Job Evaluation Committee (JJEC)

- 3.1 The JJEC will have equal representation and participation from the parties consisting of three (3) members from CUPE 4879 and three (3) members from the administrative staff of Thompson Rivers University.
- 3.2 A minimum of two from each party to make a quorum.
- 3.3 Each party will select a Co-Chair from among its membership on an annual basis.
- 3.4 The Co-Chairs are responsible for ensuring:
 - a) The chairing of the Committee meetings.
 - b) Review of the priority of matters to be acted upon by the Committee.
- 3.5 The employer will provide administrative support to the Committee. The person performing these functions will not be a member of the Committee. These services will include:
 - a) The distribution of all Committee correspondence to the Committee.
 - b) The scheduling of Committee meetings which include notification of appropriate supervisors for Committee members' attendance.
 - c) The preparation and distribution of meeting agendas and JE packages normally seven (7) days and no later than forty-eight (48) hours prior to the meeting.
 - d) The preparation and distribution of minutes.
 - e) The preparation and distribution of Committee documents.
- 3.6 The union Committee members and any alternates appointed by the union will be granted leave of absence with pay and without loss of seniority for periods of time spent working on the committee as per Article 22(b) of the Collective Agreement.
- 3.7 These members will continue to have all rights and privileges of the collective agreement including access to the grievance procedure, promotional opportunities and salary increments to which the employee would normally be entitled, including any increase that may occur as a result of an evaluation of their present position.
- 3.8 Routine business decisions of the Committee will be made by a simple majority. Job rating decisions will require a unanimous decision of the full Committee and will be final and binding on the parties, subject to the appeal procedure set out in Article VII.
- 3.9 The Committee will meet as necessary at a mutually agreed upon time and place. Each member will receive notice along with the agenda for the meeting normally within seven (7) days and no later than forty-eight (48) hours prior to the meeting. Either party may call a meeting by giving written notice and this meeting will take place within seven (7) working days of the delivery of the notice to the other party's co-chairperson.
- 3.10 Either party to the agreement may engage advisors to assist its representatives on the Job Evaluation Committee. Any such advisor will be entitled to voice but not to vote and will not be considered to be a member of the Committee.
- 3.11 Committee members will be excused from rating their own job, the position of a direct subordinate, or any position where the rating of that job may place them in a real or perceived conflict of interest situation.

- 3.12 As noted in Article 4.1 the role of the JJEC is to evaluate jobs. Members of the JJEC must ensure that their positions or views on labour relations issues or grievance issues do not impact the evaluation of jobs. If a member of the JJEC is not able to evaluate a position in an unbiased manner in accordance with this Article they will be excused from rating that job.

Article 4 Mandate of the Joint Job Evaluation Committee (JJEC)

- 4.1 The JJEC will maintain the Job Evaluation Program by:
- a) Evaluating all jobs using the Job Evaluation Plan. The JJEC will measure the job as it currently exists. It does not measure a job as it may change in the future.
 - b) Reviewing and confirming established job descriptions and/or rankings, in consultation with supervisors and employees. The JJEC will not subsequently alter the duties or qualifications of a job description without consultation and agreement with the supervisor.
 - c) Processing appeals, as outlined in the Appeals Procedures, Article VII.
 - d) May recommend any changes to the Job Evaluation Manual, Job Evaluation Plan and the job evaluation process to the Director, Human Resources and to the President CUPE 4879. All recommendations are subject to negotiation and ratification between CUPE 4879 and TRU. The JJEC will meet annually to review the manual, the plan and all job evaluation processes.
 - e) Documenting decision criteria and precedents on an on-going basis for future Committee reference. One copy to be retained by the union, one copy retained and accessible to both parties.
- 4.2 In the event that the Committee identifies a situation not covered by the above responsibilities and which may have an impact on the job evaluation process, it will refer the matter to the Parties.

Article 5 Evaluation Process

- 5.1 The agreed upon Job Evaluation Plan will be used to evaluate and rate all jobs according to the outlined point system.

5.2 Job Description

A job description includes job summary, duties and responsibilities, qualifications, skills and knowledge and working conditions. The description of specific duties will be brief to allow for minor changes in the methods used to complete tasks. The language used will be consistent with definitions in the glossary of terms.

In consultation with Human Resources the supervisor will:

- a) Analyze existing and proposed jobs and prepare job descriptions in the approved format.
- b) Submit the new job description or review form through their Dean/Director and the appropriate executive officer to the appropriate Human Resources Personnel, who, after review, will forward the job description to the JJEC.

5.3 The following general procedures will be used to rate all jobs:

Step 1

A Job Evaluation Questionnaire (JEQ) will be completed by the incumbent(s) and the supervisor. The completed questionnaire will be submitted to the Job Evaluation Committee along with the copy of the current job description. The questionnaire should detail any changes to the job resulting from new or changed circumstances in the job.

Step 2

The Job Evaluation Committee will review job descriptions according to the established format and will, if necessary, make editorial revisions. The Committee may, when deemed necessary, conduct interviews with incumbents and supervisors to clarify job description information.

The JJEC may recommend amendments to the job description, as deemed necessary by the Committee, from the response of the incumbent(s) and the supervisor. Revised job description will be submitted to the appropriate Human Resources Personnel for review as per Article 5.2.

Step 3

The job will be rated based on the job description in accordance with the Job Evaluation Plan. The Committee will also use information obtained from the completed questionnaire and, if required interview the incumbent(s) and/or supervisor or visit the workplace.

Step 4

When the Committee has completed rating the job, it will provide the supervisor and the incumbent(s) with a copy of the job description and Job Evaluation Rationale Form (Appendix B).

A permanent record containing all information, including the finalized job description, will be established for each job and retained in the Human Resources Division, accessible by both parties.

5.4 When rating jobs using the Job Evaluation Plan, the following general rules will apply:

- a) It is the content of the job, and not the performance of the incumbent(s), that is being rated.
- b) Jobs are evaluated without regard to existing wage rates.
- c) Jobs are rated at the appropriate degree level in each subfactor by comparing the specific requirements of the job to the subfactor definition and the description of each degree level.
- d) The job analysis and rating of each job will be relative to and consistent with the job descriptions and ratings of all other jobs rated under the plan.
- e) No interpolation of subfactor degrees (i.e. mid-points) is permitted.
- f) The factors and subfactors must have an impact on all jobs being rated.
- g) Rating decisions will include a sore-thumbing process to ensure consistency in Committee decisions.

Article 6 Job Evaluation Maintenance

6.1 Maintenance

It is important that the parties maintain accurate job descriptions and job ratings on an on-going basis. Failure to do so will serve to damage the integrity of the program. It is the intention of the parties to periodically review jobs upon request and to complete a review of all jobs within five (5) years. The initial review will commence following the complete implementation of the Joint Job Evaluation Program. The Co-chairs will determine the maintenance schedule.

6.2 Job Evaluation Procedure for New Jobs

Whenever the employer establishes a new job, the following procedures will apply:

- a) The employer will prepare a draft job description as per Article 5.2.
- b) The Job Evaluation Committee will meet and establish a temporary pay grade for the job, based on the draft job description. Where the Job Evaluation Committee cannot meet or reach agreement on setting a temporary pay grade within ten (10) working days then the employer will establish a temporary pay grade for the job.
- c) The job will be posted and any person appointed to the job will be paid the temporary pay grade.
- d) Five (5) months after appointment to the job, Human Resources will notify and send the incumbent(s) and the supervisor a Job Evaluation Questionnaire. The questionnaire must be submitted by the incumbent(s) and the supervisor within sixty (60) calendar days along with the draft job description to the Job Evaluation Committee. The Job Evaluation Committee will review the job description and rate the job according to the procedure set out in Article 5.
- e) The Co-chairs of the JJEC will inform the union, Human Resources, the incumbent(s) and supervisor of its decision using the Job Evaluation Rationale Form (Appendix B) of the results of all job evaluations within ten (10) working days of the position rating. The rating of the job will determine the pay grade for the job.
- f) If the pay grade increases as a result of the six-month review, such increase will be paid to each incumbent effective the date of his/her appointment to the job. In the event that the pay grade of the job decreases as the result of this six-month re-examination of the job, the incumbent will receive full red-circling protection for the duration of his or her tenure in the job.

6.3 Evaluation Procedure for Current and Changed Jobs

Whenever the supervisor/employer changes the duties and responsibilities of a job or the incumbent(s)/union feel that the duties and responsibilities of a job have been changed or that the job description does not reflect the duties and responsibilities of the job, the following procedures will be followed:

- a) The incumbent(s)/union or the supervisor/employer may request a job evaluation review by completing and submitting a Job Evaluation Form (Appendix C).
- b) Upon receipt of a completed Job Evaluation Form, the Job Evaluation Committee will proceed to gather accurate, up-to-date information on the job in accordance with Article 5. The gathering of information will involve requesting the incumbent(s) and supervisor to complete an up-to-date Job Evaluation Questionnaire along with revisions to the job description. Where further information is required, interviews will be held with incumbents and/or supervisors and/or visits to the workplace. Based on this

information, the committee may recommend updates to the job description and as per the procedures of Article 5.3.

- c) Where the job description has been changed, the Committee will meet to rate each subfactor of the job, and to establish a new rating for the job.
- d) The Co-chairs of the JJEC will inform the union, Human Resources, the incumbent(s) and supervisor of its decision using the Job Evaluation Rationale Form (Appendix B) of the results of all job evaluations within ten (10) working days of the position rating. The rating of the job will determine the pay grade for the job.
- e) If the pay grade increases as a result of the review, such increase will be paid to each incumbent effective the date the Job Evaluation Form (Appendix C) was received by Human Resources. In the event that the pay grade of the job decreases as the result of this six-month re-examination of the job, the incumbent will receive full red-circling protection for the duration of his or her tenure in the job.

6.4 Redundant Jobs

Supervisors will apprise Human Resources of redundant positions as decided by Divisional management. Human Resources will subsequently inform the JJEC of such decisions.

Article 7 Appeal Process

- 7.1 An employee and/or supervisor may only appeal a consensus decision of the JJEC on the following grounds:
 - a) Significant and relevant new information has become available that was not considered by the Job Evaluation Committee during their evaluation; or
 - b) The Job Evaluation Committee's rating contains factual errors of a material nature.
- 7.2 Within thirty (30) calendar days of receipt of the Job Evaluation Rationale Form (Appendix B) a Job Evaluation Form (Appendix C) stating which ground they are filing the appeal under, and the reason(s) for disagreeing with the decision will be submitted to the JJEC.
- 7.3 If the JJEC unanimously agrees that the criteria in Article 7.1 has not been met, the Appeal will not be heard. In all other cases, the JJEC will consider the Appeal. The JJEC is not required to consider those factors which they unanimously agree do not meet the criteria in Article 7.1. The JJEC will meet with or without the incumbent / supervisor to consider the Appeal.
- 7.4 The Co-chairs of the JJEC using a Job Evaluation Rationale Form (Appendix B) will inform Human Resources, the union, the incumbent(s) and the supervisor within ten (10) working days of the date of the appeal meeting. A unanimous decision of the JJEC on the Appeal is final and binding upon the Parties and all employees affected.
- 7.5 If the pay grade changes as a result of the Appeal then New Jobs Article 6.2 (f) will come into effect and Current and Changed Jobs Article 6.3 (e) will come into effect.

Article 8 Settlement of Disagreement within the Committee

- 8.1 In the event the Joint Job Evaluation Committee is unable to reach agreement on any matter relating to the interpretation, application or administration of the Joint Job Evaluation Program,

the Co-chairs of the Committee will ask, within ten (10) working days, the Designated Management Representative and the CUPE National Joint Job Evaluation Representative to meet with the JJEC and attempt to assist in reaching a decision.

- 8.2 If the JJEC is unable to reach a decision, the Designated Management Representative and the CUPE National Joint Job Evaluation Representative will attempt to reach a decision on the disagreement which if reached will be final and binding upon the Parties and all employees affected. If a decision cannot be reached by the Designated Management Representative and the CUPE National Joint Job Evaluation Representative either party may refer the matter to arbitration.
- 8.3 The arbitrator will decide the matter upon which the job evaluation committee has been unable to agree and his/her decision will be final and binding on the job evaluation committee, the employer, the union and all affected employees.

Article 9 Applying the Rating to the Salary Ranges

- 9.1 Job ratings serve to:
 - a) Group jobs having relatively equivalent point values (this is commonly referred to as banding).
 - b) Provide the basis upon which wage rate relationships between jobs are established.
 - c) Measure changes in job content.
 - d) Assign jobs into their proper pay grade in the salary schedule.
- 9.2 The total point allocation will be used to determine the salary range for the jobs. Salary ranges are negotiated by the parties and provided in the Collective Agreement.
- 9.3 If a job is rated at a pay grade with a salary range higher than the current wage rate for the job, the incumbent's rate of pay will be adjusted to the higher pay grade on the new salary schedule, retroactive to the date the Job Evaluation Form (Appendix C) was submitted.
- 9.4 If a job is rated at a pay grade with a salary range lower than the current wage rate for the job, all incumbents of such jobs will be identified as "red-circled".
- 9.5 No incumbent will have their wages reduced following the re-evaluation of their job and the establishment of a new wage structure.

Article 10 Conclusion and Implementation

- 10.1 The Job Evaluation Committee will report its recommendations for changes to the Job Evaluation Plan or to the Maintenance Manual to the parties for ratification.
- 10.2 The time limits contained in this Maintenance Agreement may be extended only by mutual agreement of the parties.
- 10.3 This Job Evaluation Maintenance Manual, the Job Evaluation Plan and any other documents as agreed to by the Parties will be deemed to be included in the Collective Agreement, effective the date of signing of the Maintenance Manual and Job Evaluation Plan.

Appendix A – Job Description Glossary of Terms

ACTS AS	The incumbent's job includes, on a regular basis, performing all the responsibilities of another job
ANALYSES	To study and evaluate
ADMINISTRATIVE SUPPORT	May include but is not restricted to: <ul style="list-style-type: none">• handling and responding to sensitive information• researching and compiling reports• responsibility for daily operation of the divisional office• prioritizing and handling correspondence
ARRANGES	To prepare or plan for
ASSESSES	To evaluate information against established criteria
ASSISTS	To help another employee in the completion of a task or to help clients in the completion of forms or the operation of equipment
CHECKS	To ensure correctness of tasks
CLERICAL SERVICES/ SUPPORT	May include but is not restricted to: <ul style="list-style-type: none">• data entry• record keeping• maintaining filing systems• processing forms and documents• accounting functions• compiling reports
CLUSTER	An academic grouping or department
COLLABORATION	The action of working with someone to produce or create something
COMPILES	To assemble information from a variety of sources and put together in an orderly form
COORDINATES	a) To plan and organize activities, events or functions b) To plan and organize the work of employees
DESIGN	To create; to plan and carry out
DISTRIBUTES	To give out
ESTABLISHES	To set up and implement
FILES	A manual or electronic record
FILING SYSTEMS	A collection of files or records
GENERATES	Using an established program or procedure to produce a report or document
LIAISON	To provide a link between two or more parties
MAINTAIN	a) To assume responsibility for b) To keep in working order
MAY	To perform a function on an infrequent basis
MONITOR	To check the progress of
PERFORMS	To carry out an action

PREPARES	a) To put together b) To make ready
PROCESSES	To move tasks along within a defined procedure
PROVIDES	To supply support, services or goods
PROVIDES TRAINING	To familiarize with use of equipment, processes or procedures
RECEPTIONIST SERVICES	May include but is not restricted to: <ul style="list-style-type: none"> • responding to telephone and counter inquiries • making appointments • recording messages
RECOMMENDS	To suggest
RESEARCHES	To investigate
REPLIES/RESPONDS	To answer in verbal or written form
RELIEVES	To assume some, but not all, of the duties of another job on a short term or irregular basis
REVIEWS	To examine or inspect
SCHEDULES	To arrange for a specific time
SECRETARIAL SUPPORT	May include but not restricted to: <ul style="list-style-type: none"> • composing and typing of correspondence • making travel arrangements • scheduling appointments and arranging meetings • preparing documents and/or manuals • attending meetings and preparing minutes
TASK	A single function
VERIFY	To examine for correctness, identify errors and take corrective action
WORK	A combination of tasks



**JOB EVALUATION
RATIONALE FORM**

Job Title:

Department:

This is to advise the rating for the job to which you have been appointed is as follows:

Subfactor	Definition/Rationale	Degree	Points
Education	Measures the amount of theoretical knowledge, specific education and specialized training which is required for learning and performing the job.		
Rationale			
Experience	Measures the amount of practical experience required to be able to perform the job duties.		
Rationale			
Concentration	Measures the period of time wherein mental and/or visual attentiveness is required on the job.		
Rationale			
Physical Effort	Measures the physical activity by the type and duration required to perform the duties.		
Rationale			
Dexterity	Measures the level of dexterity required by the job. Manual dexterity is determined by considering the elements of speed and coordination.		
Rationale			

Subfactor	Definition/Rationale	Degree	Points
Judgment & Decision Making	Measures the level of judgment and difficulty of decisions the incumbent is required to make.		
Rationale			
Accountability/Impact of Decisions	Measures the possibility for and effect of errors. The impact of actions is measured in the loss of time or resources and the effect on public image.		
Rationale			
Communication & Contacts	Measures the extent to which contacts are a part of the job and the amount of responsibility required in dealing with the contacts.		
Rationale			
Coordination/Supervision of Others	Measures the extent to which an employee is required to coordinate the work of others such as students and/or employees.		
Rationale			
Working Conditions	Measures the type and frequency of undesirable conditions under which an employee is required to carry out the job duties		
Rationale			

NOTE: APPEAL: If the incumbent(s) and/or the supervisor disagree with the decision of the Joint Job Evaluation Committee, you may request an appeal by completing a Job Evaluation Form (Appendix C) and submitting it to the Job Evaluation Committee within thirty (30) days of receipt of this document. Reason for disagreement must be included in the Job Evaluation Form.

Date: _____

Pay Band: _____

Points: _____

Co-Chair Initials _____



JOB EVALUATION FORM

Job Title:	Department:
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REASON FOR REQUEST:	INSTRUCTIONS:
RECONSIDERATION <input type="checkbox"/> Six-month review of new job <input type="checkbox"/> Job Review <input type="checkbox"/> Employer initiated job changes	Attach completed job evaluation questionnaire and job description Attach draft job description
APPEAL <input type="checkbox"/> Significant and relevant new information has become available that was not considered by the JJEC <input type="checkbox"/> Rating contains factual errors of a material nature	Attach appropriate sections of Job Evaluation Questionnaire and job description

EXPLANATION OF REASON FOR REVIEW:

REQUEST INITIATED BY: Incumbent(s) Supervisor Employer Union

Signature: _____ **Date:** _____

NOTE: Send original to job evaluation committee via Human Resources. Copies forwarded to:

Incumbent(s) Supervisor Union

Appendix D – Factor Weights

FACTOR WEIGHTS

Degree Levels

Factors	1	2	3	4	5	6	7	8	9	10
1. Education	15	30	45	60	75	90	105	120	135	150
2. Experience	14	28	42	56	70	84	98	112		
3. Concentration	10	20	30	40	50					
4. Physical Effort	5	10	15	20	25					
5. Dexterity	5	10	15	20						
6. Judgment & Decision Making	14	28	42	56	70	84				
7. Accountability/Impact of Decisions	10	20	30	40	50					
8. Communication and Contacts	10	20	30	40	50	60				
9. Coordination/ Supervision of Others	10	20	30	40	50	60	70			
10. Working Conditions	10	20	30	40	50					

Appendix E – Pay Band – Point Distributions

Pay Band	Point Range
1	101 - 140
2	141 - 180
3	181 - 220
4	221 - 260
5	261 - 300
6	301 - 340
7	341 - 380
8	381 - 420
9	421 - 460
10	461 - 500
11	501- 540
12	541– 580
13	581- 620