

CUPE GENDER-NEUTRAL JOB EVALUATION PLAN

DEVELOPED BY CUPE JOB EVALUATION

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INTRODUCTION

This **CUPE GENDER-NEUTRAL JOB EVALUATION PLAN** has been designed as one of several systems of comparison for the purpose of arriving at pay equity by establishing equivalency and relationships between jobs performed by men and women.

The joint committee process will be used to establish and complete the **step-by-step procedures**. (see page 5)

This **CUPE GENDER-NEUTRAL JOB EVALUATION PLAN** contains a rating manual which allows jobs to be placed in a proper relative order dependent upon their rated worth. This rating manual is based upon **four (4) main factors**:

- · Skill
- · Effort
- · Responsibility
- Working Conditions

To ensure a complete and comprehensive rating manual, which will measure elements of work that are present to a certain degree in all jobs, each factor has been subdivided into subfactors, eleven (11) in all. Each of these subfactors will measure the various compensable components that make up the jobs.

By measuring each of these compensable factors, and assigning a numerical value to them, this plan places a numerical value upon a job.

The value is used for comparing jobs according to their relative worth. This consistent application of the measurement of jobs is the purpose to which a job evaluation plan is put.

This CUPE GENDER-NEUTRAL JOB EVALUATION PLAN strives to ensure that all aspects of its usage are free of gender bias in seeking the consistent application of certain values to the wage structure. By evaluating jobs in a manner that shows the true value of the job, without regard to existing wages, pay equity relativity will be realized. Once the size and location of wage inequities have been identified by the parties, they can be addressed through negotiation.

Factor Definitions and Notes to Raters are provided to assist joint job evaluation committee members, or raters, in understanding the subfactors. It is critically important to the rating process that the subfactors be clearly understood and interpreted in a consistent manner. It would be self-defeating if the subfactors were to be interpreted differently by different rating teams, as they change over time. Objectivity rather than subjectivity is critically important.

It is fundamental to the task of job evaluation that the joint job evaluation committee be aware that they are not rating an individual employee's performance. Job content information should be found within the job questionnaire, job description, interviews and/or work site visits.

In summary, the exercise of job evaluation measures the job as it currently exists. It does not measure an individual who performs a job, nor does it measure a job as it is likely to change in the future. Changes in job content need to be addressed by a reclassification and/or maintenance procedure at the time that they actually change.

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The consistent application of this plan will result in the information needed to rectify wage inequities and discrimination based on gender.

Some examples of how the **CUPE GENDER-NEUTRAL JOB EVALUATION PLAN** avoids gender discrimination are as follows:

a) Amount of interruption and simultaneous processing

Many female dominated jobs are characterized by interruptions and requirements for simultaneous processing of information. Many clerical jobs involve not only great accuracy at tasks requiring fine motor control, but also require that phones be answered and people greeted simultaneously. Subfactors in job evaluation plans should give fair value to jobs with interruption and simultaneous processing requirements.

b) Muscle power

Male dominated jobs are often characterized as involving full body movement; however, female dominated jobs often tend to involve repeated and confined use of only a few muscles. Evaluation systems should give value to both kinds of muscle use.

c) Interpretation of negative working conditions

Some job evaluation plans have traditionally put weight on working in cold, wet, noisy and dirty places, factors found most often in male dominated jobs. Elements not considered but found in many female jobs include confinement to small places, restricted body movement and noise from machines such as typewriters, taleption as and printers. The subfactors anould take these conditions into account.

In summary, the essential characteristics of a job evaluation plan which embraces the need for pay equity applications are:

- 1. It will be **Gender-Neutral** in its design, and will survive a test of its neutrality and freedom from associated biases;
- 2. It will be balanced, having an equal effect on female and male dominated jobs.
- 3. It will be comprehensive, having a structure that will embrace as many aspects of the work done in the organization as possible;
- 4. It will be workable and comprehensible to the Union and Management Representatives within the organization who will be in charge of making the pay equity/internal equity effort work.
- 5. It will be flexible enough to be tailored to the conditions of the workplace concerned.

This CUPE GENDER-NEUTRAL JOB EVALUATION PLAN meets these criteria.

STEP BY STEP PROCEDURES

PHASE	PROCEDURES	STEPS		
1	Program Planning	 Agree on Terms of Reference Develop communication structure Select committee members 		
2	Training	 Review all related documents: Gender-Neutral Job Evaluation Plan Job Analysis Questionnaire Rating forms Job description format Detailed workplan and schedule 		
3	Job Analysis and Job Description Writing	 Determine job analysis procedure Completion of questionnaire by job incumbents and supervisors Prepare job descriptions Review and approval of drafts Finalize and sign job descriptions 		
4	Validate Plan / Rate Jobs	 Test plan and revise, if necessary Rate all jobs Review all ratings using factor analysis and frequency distribution Establish reconsideration procedure and communicate results 		
5	Prepare Final Report	 Include all job evaluation documents (Job Evaluation Plan, Questionnaire, Job Descriptions, rating and corresponding job codes and titles) Recommend weights, banding and maintenance procedure 		
6	Implementation and Ratification	 Negotiate collective agreement language (i.e. maintenance procedure) Develop new salary structure Calculate costing, wage adjustments and retroactivity Determine implementation schedule 		
7	Maintenance	Maintain joint committee Ongoing review of all jobs		

SUBFACTOR 1 - KNOWLEDGE

DEFINITION:

This subfactor measures the general knowledge and specialized or vocational training necessary to perform the job duties in a satisfactory manner and has no relationship to the academic achievement of an employee. The degree levels are normally expressed in terms of formal education or equivalent. Similar levels of achievement can be obtained through related experience, courses or self-improvement.

DEGREES:

- Less than high school graduation or equivalent.
- Less than high school graduation plus an additional program/course(s) or equivalent.
- 3. High school graduation or equivalent.
- 4. High school graduation plus an additional program/course(s) of up to six months or equivalent.
- 5. High school graduation plus an additional program/course(s) of over six months and up to one year or equivalent.
- High school graduation plus an additional program of over one and up to two years or equivalent.
- 7. High school graduation plus an additional program of over two and up to three years or three years undergraduate degree or equivalent.
- 8. Undergraduate degree Four years or equivalent.
- 9. Graduate level.

SUBFACTOR 1 - KNOWLEDGE

NOTES TO RATERS

- 1. Use today's educational levels and standards of your province. It is the level of knowledge normally required using "today's" standards which must be measured, not the educational background of the incumbent.
- 2. When rating the knowledge subfactor, reference should be made to the Experience subfactor.
- 3. Additional training/courses required to perform the duties of the job should be considered in this subfactor.
- 4. The degree level bears no relation whatsoever to the hiring practice of the organization.
- 5. For jobs coming from an apprenticeship programme, only the actual classroom time is measured in this subfactor; time spent learning on-the-job is measured under the Experience subfactor.

SUBFACTOR 2 - EXPERIENCE

DEFINITION:

This subfactor should be considered when the degree of knowledge is established. It serves as a scale of measurement for the amount of practical experience that an average individual having the appropriate theoretical knowledge, specific education and specialized training, would require to be able to perform the job duties. It includes the sum of (a) and (b):

- a) Experience in any related work or work in lesser positions and other relevant work and life experiences which are necessary for performance of the jobs.
- b) The period of training and adjustment on the job itself.

DEGREES:

- 1. Up to and including one month.
- 2. Over one month, up to and including three months.
- 3. Over three months, up to and including six months.
- 4. Over six months, up to and including one year.
- 5. Over one year, up to and including two years.
- 6. Over two years, up to and including three years.
- 7. Over three years, up to and including four years.
- 8. Over four years, up to and including five years.
- 9. Over five years.

SUBFACTOR 2 - EXPERIENCE

NOTES TO RATERS

- 1. Experience covers the time required to learn the practical application of theoretical knowledge to work problems, and to learn the necessary techniques, methods, practices, procedures, use of forms, routines, etc.
- 2. Under this subfactor, no consideration is given to the maturing of the individual.
- 3. It includes the years spent in an apprenticeship or similar training program excluding formal classroom time.
- 4. Field time required for membership in a professional organization, designation, or requirements for a license should be considered under this subfactor.
- 5. This subfactor does not measure the actual experience of the incumbent(s) and bears no relation whatsoever to the hiring practice of the organization.
- 6. Life experiences to include categories such as homemaking, child rearing, participation in sports, clubs, volunteer work, etc.

SUBFACTOR 3-JUDGEMENT

DEFINITION:

This subfactor measures the judgement, choice of action and initiative required in applying methods, procedures, or policies to complete the job duties.

DEGREES:

- 1. The job requires the use of established guidelines that are well defined or detailed. There is little or no choice of action.
- 2. The job requires the application of established methods or procedures. Work may involve a choice of methods.
- 3. The job requires adapting established methods or procedures. Work involves a choice of methods or procedures.
- 4. The job requires that changes be recommended to established methods or procedures. Work involves a choice of methods or procedures or sequence of operation.
- 5. The job requires the development of procedures.
- 6. The job requires that changes be recommended to established policies.

SUBFACTOR 3 - JUDGEMENT

NOTES TO RATERS

- This subfactor deals with the range of choice of action which is within the scope of the job duties, and does not deal with the responsibility for decisions which is dealt with under the Responsibility factor.
- Consider the initiative required in problem solving, analysis of situations and problems, the application of fundamental principles and the extent to which judgement must be exercised in deciding upon the appropriate choices of action.
- Evaluate the judgement permitted within the parameters and constraints of the position. No consideration is given to the capabilities of the incumbent.

SUBFACTOR 4 - CONCENTRATION

DEFINITION:

This subfactor measures the period of time wherein mental, visual and/or aural

	concentration is required on the job. Both the frequency and duration of the effort are be considered.			
DEG	REES:			
1.	Occasional periods of short duration.			
2.	Frequent periods of short duration;			
	OR			
	Occasional periods of intermediate duration.			
3.	Almost continuous periods of short duration;			
	OR			
	Frequent periods of intermediate duration;			
	OR			
	Occasional periods of long duration.			
4.	Almost continuous periods of intermediate duration;			
	OR			
	Frequent periods of long duration;			

Almost continuous periods of long duration. 5.

SUBFACTOR 4-CONCENTRATION

NOTES TO RATERS

- 1. Attentiveness is required for all jobs, rate tasks requiring concentration.
- 2. Concentration includes activities such as listening, interpreting, reading, watching, driving, inputting data, or when a combination of the five senses, sight, taste, smell, touch and hearing are required in the course of doing the job that result in mental/sensory fatigue.
- 3. Consider components such as interruptions and the requirements for simultaneous processing of information, (i.e. maintaining concentration despite frequent interruptions or changes in work priorities).
- 4. a) **Duration** of uninterrupted time is measured as follows:

Short Up to and including one hour.	
Intermediate	Over one hour, and up to and including two hours.
Long	In excess of two hours.

b) Frequency relates to work carried out on a regular basis throughout the year.

Occasional	Once in a while, most days.
Frequent Several times a day or at least four days per week	
Almost Continuous	Most working hours for at least an average of four days per week.

5. Subfactor Chart

FREQUENCY	DURATION			
	Short	Intermediate	Long	
Occasional	1	2	3	
Frequent	2	3	4	
most Jana nuous	3	4	5	

SUBFACTOR 5-PHYSICAL EFFORT

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This subfactor measures the physical activity by the type and duration required to perform the job duties.

DEGREES:	:
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1. Ligh	activity of short duration.
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2. Light activity of intermediate duration;

OR

Medium activity of short duration.

3. Light activity of long duration;

OR

Medium activity of intermediate duration;

OR

Heavy activity of short duration.

4. Medium activity of long duration;

OR

Heavy activity of intermediate duration.

5. Heavy activity of long duration.

SUBFACTOR 5-PHYSICAL EFFORT

NOTES TO RATERS

- 1. Consider restriction of movement.
- 2. a) **Types** of physical exertion:

Light	sitting, driving, walking on even surfaces, lifting weights not exceeding 5 kg.
Medium	standing, climbing stairs, walking on uneven surfaces, lifting weights not exceeding 10 kg.
Heavy	stooping, kneeling, crouching, lifting weights exceeding 10 kg.

b) **Duration:** In determining the duration of time, consideration is given to the frequency of the task during the normal workday or shift.

Short Up to and including one hour.	
Intermediate	Over one hour and up to and including two hours.
Long	In excess of two hours.

3. Subfactor Chart

TYPE	DURATION			
	Short	Intermediate	Long	
Light	1	2	3	
Medium	2	3	4	
Heavy	3	4	5	

SUBFACTOR 6 - DEXTERITY

DEFINITION:

This subfactor measures the level of dexterity required by a job. The levels of manual dexterity are determined by considering the elements of speed and/or hand/eye (or hand/foot) co-ordination. Movements can be either fine, coarse or a combination of the two.

DEGREES:

- 1. Job requires tasks that demand co-ordination of coarse movements, where, speed is a minor consideration.
- 2. Job requires tasks that demand the co-ordination of coarse movements, where speed is a moderate consideration;

OR

Co-ordination of coarse and fine movements, where speed is a minor consideration.

3. Job requires tasks that demand the co-ordination of coarse movements, where speed is a major consideration;

OR

Co-ordination of coarse and fine movements, where speed is a moderate consideration;

OR

Co-ordination of fine movements, where speed is a minor consideration.

4. Job requires tasks that demand the co-ordination of coarse and fine movements, where speed is a major consideration;

OR

Co-ordination of fine movements, where speed is a moderate consideration.

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SUBFACTOR 6 - DEXTERITY

NOTES TO RATERS

- 1. Examples of coarse movements are: using long handled tools such as mops and shovels, floor polishers, lawn mowers, stocking shelves, loading and unloading of trucks, folding laundry, sorting and delivering mail, etc.
- Examples of fine movements are: keyboard skills, arc welding, giving injections, 2. drafting, repairing fine instruments/equipment and dispensing oral medications.
- 3. Subfactor Chart

DEXTERITY MOVEMENT	SPEED CONSIDERATION			
	Minor	Moderate	Major	
Coarse	1	2	3	
Coarse/fine	2	3	4	
Fine	3	4	5	

Speed consideration is determined by the necessity of performing tasks within a 4. specific period of time.

Minor: Speed is not a significant requirement when undertaking tasks.

Speed matters in undertaking tasks but other considerations are at Moderate:

least as important.

The speed with which tasks are undertaken is central to the nature Major:

of the work.

SUBFACTOR 7 - ACCOUNTABILITY

DEFINITION:

This subfactor measures the effect of actions on others and covers the relationship between the nature of the work, the loss of time and resources and the impact of the work on the organization.

DEGREES:

1.	Actions have little or no effect and are routinely checked.

- 2. Actions could result in minor loss of time or resources and may affect the work of others.
- 3. Actions could result in significant loss of time, resources;

OR

cause some embarrassment within the department.

4. Actions could result in serious loss of time or resources;

OR

cause significant embarrassment within the organization and have limited impact on its public image.

Actions could result in major loss of time or resources;

OR

cause severe embarrassment within the organization and have serious impact on its public image.

SUBFACTOR 7 - ACCOUNTABILITY

NOTES TO RATERS

- 1. Consider the nature of the more serious probable errors of the job (regardless of the type or cause), at what stage errors would be detected and their effect.
- 2. Consider accountability in terms such as:
 - handling money
 - damage or loss involving equipment, supplies or property
 - · disruption or delay of service
 - loss of time in detecting and correcting an error
 - inaccuracy of reports or records
 - safeguarding of restricted information
 - morale of others
 - the seriousness of an error
 - embarrassment to the organization, department

SUBFACTOR 8 - SAFETY OF OTHERS

DEFINITION:

This subfactor measures the degree of care required to prevent injury or harm to others.

DEGREES:

- 1. Little degree of care required to prevent injury or harm to others.
- 2. Some degree of care required to prevent injury or harm to others.
- Considerable degree of care required to prevent injury or harm to others.
- High degree of care required to prevent injury or harm to others.

SUBFACTOR 8 - SAFETY OF OTHERS

NOTES TO RATERS

- 1. This subfactor is not to be seen as conflicting with any and all Health and Safety Regulations in the workplace, nor is it an evaluation of such regulations.
- 2. It is recognized that all incumbents have a self-disciplined responsibility for the welfare of others which includes their fellow workers. However, some jobs and their locations have more potential hazards than others and it is in this context that the relative differences of "little", "some", "considerable" and "high" are used. Before rating this subfactor raters should define under degree of care the meaning of "little", "some", "considerable" and "high degree" as it applies to the workplace. Consider the following examples as a guide:

Little	Closing of file drawers.
Some	Posting of "wet floor" signs, stacking supplies.
Considerable	Putting up bed rails, use of heavy equipment, yard duty.
High	Use of hazardous materials, administering medication, driving a school bus.

SUBFACTOR 9 - SUPERVISION OF OTHERS

DEFINITION:

This subfactor measures the extent to which an employee is required to supervise the work of others such as students, volunteers, employees (full-time, part-time, casual, etc.) of the employer, employees of other organizations.

DEGREES:

- 1. Supervisory responsibility is not normally part of the job requirement, but there may be a requirement to show others how to perform tasks or duties.
- 2. The job requires the employee to periodically assume some of the normal supervisory responsibilities over others.
- 3. The job requires the employee, on a continuing basis, to assume some of the normal supervisory responsibilities over others.
- 4. The job requires the employee to assume, on a continuing basis, the normal supervisory responsibilities over others. May perform some duties similar to those of the employees supervised.
- 5. The job requires the employee to assume, on a continuing basis, the normal supervisory responsibilities over others. The work is typified as a full-time supervisor.

SUBFACTOR 9 - SUPERVISION OF OTHERS

NOTES TO RATERS

- 1. "Periodically" as used in the second degree means intermittently but with reasonable regularity.
- 2. To qualify for the third or higher degrees under this subfactor, supervisory responsibility must be a definitely established part of the job requirement and must not be just transient or experimental phenomena.
- 3. "Normal supervisory responsibilities" must include a portion of each of the following:
 - a) Planning, organizing, scheduling, co-ordinating of work.
 - b) Assigning of work and/or personnel.
 - c) Maintaining quality, accuracy, quantity of work.
 - d) Giving advice, guidance, instructions, direction.
 - e) Developing of work methods, procedures or standards.

SUBFACTOR 10 - CONTACTS

DEFINITION:

This subfactor measures the nature and purpose of the contact necessary when communicating with others, be they co-workers, members of the public or clients. These communications may be in writing, or oral, including sign language, and carrying varying degrees of responsibility for the handling of contacts tactfully and harmoniously.

DEGREES:

- 1. Maintain working relationships.
- 2. Explain, exchange data or information.
- 3. Deal with or settle requests, complaints or clarification of information.
- 4. Handle contacts of a difficult or specialized nature, for the discussion and resolution of problems by presenting or obtaining detailed information.
- 5. Frequent contacts of a difficult, specialized or sensitive nature for such purposes as influencing, persuading or securing the co-operation of others.
- 6. Considerable communication and human relations skills for such purposes as influencing, persuading, motivating, or negotiating with others, and in dealing with highly sensitive issues.

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SUBFACTOR 10 - CONTACTS

NOTES TO RATERS

- 1. Contacts of a normal supervisory nature are not considered under this subfactor.
- 2. It is important to analyze the purpose of the contact in conjunction with the nature of the contact. The level of the person contacted is relevant to the extent that it serves as a check on the nature and purpose of the contact.
- 3. Working relationships mean contacts with other staff regarding a work activity.
- 4. Contacts of a **difficult or specialized nature** are those dealing with a subject area that is complex and typically requires specialized formal training or extensive experience to enable the participants to communicate in a meaningful fashion.
- 5. **Communication skills** include such skills as oral presentation skills, writing skills, (reports, correspondence) listening and observation skills.
- 6. **Human relations skills** include such skills as empathy, sensitivity, understanding of human and organizational behaviour, motivational techniques and counselling skills.

WORKING CONDITIONS FACTOR

SUBFACTOR 11 - DISAGREEABLE WORKING CONDITIONS

DEFINITION:

This subfactor measures the type and frequency of disagreeable conditions or hazards under which an employee is required to carry out the job duties throughout the year.

DEGREES:

- 1. The work is performed in an environment with little or no exposure to disagreeable conditions or hazards.
- The work is performed in an environment with occasional exposure to minor
 OR

little exposure to major disagreeable conditions or hazards.

The work is performed in an environment with regular exposure to minor
 OR

occasional exposure to major disagreeable conditions or hazards.

The work is performed in an environment with frequent exposure to minor
 OR

regular exposure to major disagreeable conditions or hazards.

5. The work is performed in an environment with frequent exposure to major disagreeable conditions or hazards.

Subfactor Chart

CONDITION/ HAZARD		FREQUENCY			
	Little	Occasional	Regular	F: :quent	
Minor	1	2	~	4	
Major	2	3		. j	

WORKING CONDITIONS FACTOR

SUBFACTOR 11 - DISAGREEABLE WORKING CONDITIONS

NOTES TO RATERS

1. Raters should consider the many and varied conditions that prevail in the workplace. The **types** of disagreeable conditions are as follows:

	MINOR
Conditions	Minor conditions of dust, dirt, fumes, heat, cold, noxious odours, noise, vibration, poor lighting, inclement weather, poor ventilation, congested workspace, interruptions, lack of privacy, limited travel, radiation from equipment.
	Exposure to rudeness or profanity.
Hazards	Minor health and accident hazards involving more serious cuts, bruises, muscle strain or some exposure to disease or contamination and the possibility of lost time.

	MAJOR			
Conditions	Extreme conditions of dust, dirt, fumes, heat, cold, noxious odours, noise, vibration, poor lighting, inclement weather, poor ventilation, congested workspace, lack of privacy, travel 50% of the time, radiation from equipment.			
	Exposure to verbal and physical abuse, behaviourally difficult clients, residents, patients, members of the public, etc.			
Hazards	Health and accident hazards of a serious nature involving aggressive clients, dangerous equipment or procedures or work with hazardous materials. Exposure to infectious disease, serious injuries that require medical attention and involves lost time.			

2. The **frequency** of exposure to undesirable working conditions must be related to work carried out on a regular basis throughout the year.

Little	Condition/hazard seldom occurs;
Occasional Condition/hazard occurs once in a while (i.e. once in a while on a daily basis several times daily, but not every day);	
Regular	Condition/hazard occurs often (i.e. several times daily, not constantly exposed);
Frequent	Condition/hazard occurs almost every day (constantly exposed, almost all of the time).

3. Do not consider conditions that are recognized and provided for under the terms of the collective agreement. (i.e. Shift Premium)

GLOSSARY OF TERMS

Degree Level The actual measurement levels 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 programme that does not discriminate

between men and women.

Incumbent An employee assigned to a job.

Job Is made up of duties, responsibilities and qualifications that

may be assigned to the same job title and held by a single

incumbent or a number of incumbents.

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

work-site observation.

Job Analysis The instrument used to collect and record job data and

Questionnaire forms part of the job documents.

Job Description The written description of a job that includes a summary

and a listing of the major duties and responsibilities.

Job Evaluation A process which measures the value of jobs in relation to

each other; this value 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.

Committee

Joint Job The Committee responsible for the implementation of the iob evaluation plan and which is made up of equal

job evaluation plan and which is made up of equal representatives from union and management.

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.

Perform Other Related Duties, as Assigned

The performance of transient, emergency or unplanned duties that must be considered within the intent of the job function and job demand as set out in the job documents.

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, responsibility or working conditions of a job that may or may not affect its total point value or pay rate.

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 a factor-by-factor basis or on a total point basis.

Subfactors

Components of the four major factors.

Task

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.