

Ontario Public Service Employees  
Union



Syndicat des  
employé-e-s de la fonction publique  
de l'ontario

Colleges of Applied Arts and Technology

Les collèges d'arts appliqués et technologie

**Support Staff  
Job Evaluation System**

**Le personnel de soutien  
Système d'évaluation des emplois**

College Compensation and  
Appointments Council



Conseil de la rémunération et des  
nominations dans les collèges

## Job Evaluator's Handbook

This document is a guide only. The official document for arbitration purposes in the Support Staff Job Evaluation Manual. In determining any evaluation you must rely upon the Job Evaluation Manual.

## Important Points

- it is very important to evaluate the position as a whole, rather than just rely on the examples given within each "skill" or "factor"
- referring back to the "Duties and Responsibilities" section should help confirm whether:
  - a skill identified in a factor section is "regular and recurring" or "occasional"
  - the examples provided for a factor capture the essence of the job function(s) appropriately
- statements that try to broadly define the level of skill required are not helpful, for example, "requires a high degree of judgement". This job evaluation system requires that specific example(s) be provided for each factor. These examples along with the "Duties and Responsibilities" are what is to be evaluated.
- the "Notes to Raters" and "Definitions" that have been provided for each factor in the job evaluation manual, **must be adhered to** as they provide directions for interpreting a factor and its levels
- The PDF and the job evaluation system have been designed to provide the evaluator(s) with complete information. Do not rate a PDF solely based on the words that have been used to describe a skill or factor. The PDF should be rated based on a combination of the "Duties and Responsibilities" section, supporting factor example(s) and the "Notes to Raters" and "Definitions". For example, the "Communication" factor has specific "Notes to Raters" and "Definition" defining the communication skill "negotiate". There may be occasions when the examples provided in the PDF are not consistent with the information provided in the "Duties and Responsibilities" section or with the definitions provided with the factor information. Should this occur, reference should be made to the "Duties and Responsibilities" section and the information in the example(s) clarified before confirming the factor level.
- to ensure this system is used consistently do not change or alter the "Definitions" that have been provided; any inconsistencies should be referred to the Joint Classification Committee for consideration

## Regular & Recurring

- must be a core or significant skill, responsibility or activity
- if a task occurs daily or weekly, it is easily identifiable as "regular & recurring"
- a task that occurs once or twice annually and takes up 25% of the work year can also be "regular & recurring"
- any task or responsibility that is an integral part of the position's work and is consistently relied on should be considered "regular & recurring"

## Occasional

- eight factors allow for this additional consideration
- to be considered, it must be a core or significant skill, responsibility or activity and the position's duties could not be performed without it
- must be performed at a higher level than the level assigned to "regular & recurring"
- associated with activities that occur for a short period of time, on a few occasions or sporadically throughout the year
- associated with a higher skill or responsibility that is needed occasionally when performing a duty, task or activity

## 1. Education

- two parts

### Part A - Formal/Primary Education

- minimum level required
- must be reasonable
- "plus professional certification" reflects the additional education and/or work experience needed that is in addition to the formal designated diploma/degree and not just the need to write an examination upon completion of the educational requirement. For example, upon completing a diploma or degree, an exam may need to be taken for certification. This requirement is not what is contemplated under "plus professional certification" and would be considered within the same level as the primary education.

### Part B - Additional Educational Requirement

- must be additional education that is not part of the education referenced in primary education (1 A)
- sessions or seminars such as familiarization sessions on internal processes are not considered as additional educational requirements
- doesn't include courses to maintain a professional designation

## 2. Experience

- minimum level required
- must be reasonable when considered with the required level of education

### 3. Analysis and Problem Solving

	Level 1	Level 2	Level 3	Level 4	Level 5
Problem Identification		Easily identifiable	Identifiable	Not readily identifiable	Complex and multi-faceted; symptoms are vague or incomplete
Investigation to define problem			May require further inquiry	Often require further investigation and research	Required
Analysis	According to established instruction and procedure.	Straightforward			
Solution	May require the selection of the most appropriate predefined alternative	May require modification of existing alternatives or past practice.	Requires the analysis and collection of information; sometimes from a source not normally used.	Requires interpretation and analysis of a range of information according to <b>established techniques</b> and/or principles	Requires interpretation and analysis of information within <b>generally accepted principles</b> .
Definition/Notes to Raters	Quite structured, limited and/or specific ways to complete tasks. Limited selection of alternatives to explore.	Quite structured, performed in the customary manner. Evident when a problem arises. Some freedom in determining how problem can be resolved - if past practice doesn't assist in resolution.	Problems readily identifiable, but must know when additional information is needed to clearly understand problem. In order to develop a solution must gather more information - sometimes from an unfamiliar source.	<b>Established techniques</b> - recognized guidelines and/or methods to accomplish a desired outcome. Can be defined as an individualized way of using tools and following rules in doing something; in professions, the term is used to mean a systematic procedure to accomplish a task.	<b>Generally accepted principles</b> - more general statements or parameters used to describe the desired outcome. Can be defined as the collectivity of moral or ethical standards or judgements.

## 4. Planning/Coordinating

	Level 1	Level 2	Level 3	Level 4
Planning or coordinating activities	Not normally required	Complete own work	Activities, information or materials	Integrate activities and resources
Purpose	Work is planned by others or determined by procedures	To enable completion of own tasks	To enable completion of tasks and events	For multi-faceted events, projects or activities involving other employees
Deadlines	<b>Standardized</b>	Achieve overlapping deadlines	Affects the work schedule of other employees	Involves modifying other employees' priorities for activities/projects to meet objectives
Definitions/Note to Raters	<b>Standardized</b> - set in place, usual or customary.	Plans and prioritizes own activities. Typically focussed on completion of activities within established deadlines or procedures (eg. scheduling, coordination of data for reports, setting-up of new software in a department to meet specific business needs). May coordinate or make arrangements for an event by coordinating the calendars of others.	Decides order and selects or adapts methods for many work assignments. Typically <b>affects</b> the work schedule of others through requests for materials and/or information by specific deadlines to plan events or activities (eg. conferences, research projects, upgrading hardware or software)  <b>Affects</b> - to produce a material influence upon or alteration in	Involves multiple inputs and complex tasks, frequently requiring the coordination of activities or resources of a number of departments, such as major campus renovation or technology upgrade. Responsible for multiple, concurrent major projects at the same time. Authority to require others to <b>modify</b> their schedules and priorities.  <b>Modify</b> - to make basic or fundamental changes to give a new orientation to or to serve a new end.

## 4. Planning/Coordinating

### Additional Comments:

- "Duties and Responsibilities" section should provide assistance, especially in determining whether or not competing or overlapping deadlines are present
- some positions regularly perform a range of tasks that have a variety of deadlines, but upon examining the tasks there is limited planning and/or coordinating required as none of the tasks have overlapping deadlines
- in Level 3 - "affect the work schedule of others" is to "produce a material influence upon or alternation in". So, not only does the planning have to affect the work schedule of others, that "affect" cannot be trivial. Planning at this level must be the type of planning that requires others to adjust their schedules to meet the incumbent's deadlines, not just to perform work at a scheduled time
- when evaluating this factor, one may find that some examples describe a problem solving process rather than the planning process. Should this occur, the distinction must be made whether the example is describing planning and not analytical skills.

## 5. Guiding/Advising Others

	Level 1	Level 2	Level 3	Level 4	Level 5
Guiding/Advising Activity	Minimal requirement	<b>Guide</b> others	<b>Advise</b> others	Guide/advise others	Guidance and advice
Purpose	May <b>explain</b> procedures to others	So that others can complete specific tasks	To enable others to perform day-to-day activities	To enable others to perform day-to-day activities	To allocate tasks to others
Responsibility for performance			Involvement is generally of an advisory nature and not responsible for how others subsequently complete their tasks.	<b>Ongoing involvement</b> in others' progress.	Ensure completion of tasks.
Notes to Raters			Subject matter expertise and uses that expertise to assist others in completing tasks.	Not responsible for formal supervision.  Assigned to assist others with less experience and is expected to actively contribute to their ongoing skill development.	Not a "formal supervisor".  Responsible for allocating tasks and using expertise to assist others and ensure tasks are completed satisfactorily.
Definitions	<b>Explain</b> - provides details or examples to help others better understand the information	<b>Guide</b> - demonstrates correct processes/ procedures for the purpose of assisting others with skill development and/or task completion.	<b>Advise</b> - has the authority to recommend, or provide knowledgeable direction regarding a decision or course of action.	<b>Ongoing involvement</b> - is intended to reflect a requirement to be involved for the duration of the process or skill development, in which the position is an active participant.	

## 5. Guiding/Advising Others

### Additional Comments:

- this factor is about helping others build their skills and improve their job performance
- the examples provided should answer the question "Is this position directly helping others in the performance of their work or skill development?" If not, it's not considered guiding and advising as contemplated by the system
- simply "telling" someone to do something is not considered guiding and advising. In this system, guiding and advising encompasses providing direction, clarification (if and when needed), demonstration of correct methods, etc.
- in Level 4 - positions have the assigned responsibility for **ongoing** involvement in helping others build their skills. This means that the position has a role in continuing to observe, mentor, demonstrate correct procedures and when necessary, correct the way others may be performing the task or activity. In a learning situation, such as a lab, this means that the incumbent not only demonstrates techniques but also has a responsibility to ensure that skills are grasped and fully understood. There could be an element of remedial work that is also needed. The position would also be involved in the student evaluation process.

## 6. Independence of Action

	Level 1	Level 2	Level 3	Level 4	Level 5
Position duties	Follow specific procedures	Completed according to established procedures	Completed according to general processes	Completed according to specific goals or objectives	Completed according to broad goals or objectives.
Decisions	Typically made by selecting between defined options	Made following specific guidelines. Changes may be made to work routine.	Made following general guidelines to determine how tasks should be completed.	Made using industry practices and/or departmental policies.	Made using College policies.
Definitions/Notes to Raters		<p>Duties are completed based upon pre-determined steps.</p> <p>Guidelines are available to assist.</p> <p>Autonomy to decide the order or sequence that the tasks should be performed.</p>	<p>Specific results or objectives that are to be accomplished are pre-determined by others.</p> <p>Ability to select process to achieve end result, usually with the assistance of general guidelines.</p> <p>Autonomy to make decisions within these parameters.</p>	<p>Only parameters or constraints to guide are industry practices for the occupation and/or departmental policies.</p> <p>Autonomy to act within these boundaries.</p>	<p>Only parameters or constraints to guide are College policies.</p> <p>Autonomy to act within these boundaries.</p>

## 6. Independence of Action

### Additional Comments:

- read the entire PDF carefully considering these key points:
  - the types of decisions that the position makes
  - what aspects of the tasks are decided by the position on its own or what is decided by, or in consultation with, someone else
  - the rules, procedures, past practices and guidelines that are available to provide guidance and direction
  
- these points, when taken as a whole, will define the parameters and constraints of the position within which the incumbent is free to act
  
- the examples described in the "Analysis and Problem Solving" section often provide additional information about the type of resources available to assist the position in making decisions
  
- although some of the guidelines and parameters may be similar to those in the "Analysis and Problem Solving" factor, this factor is concerned with the checks and balances that are in place to verify the work or support the decisions being made

## 7. Service Delivery

	Level 1	Level 2	Level 3	Level 4
Provide service	According to specific requests and established methods	According to specifications by selecting the best method	<b>Tailor</b> based on developing a full understanding of the customer's needs	<b>Anticipate</b> and <b>pro-actively</b> deliver
Notes to Raters	Typically providing answers to questions. May need to refer to/consult with another source to provide appropriate answer.	Determines which option would best suit the needs. Must be knowledgeable of all options and able to explain.	Based on a thorough understanding of a customer's need, customize the way the service is delivered or substantially modify what is delivered to suit the customer's particular circumstances.	Designs service based on current and emerging <del>future</del> needs. May envision service(s) before the customer is aware of the need.
Definitions			<b>Tailor</b> - to modify or adapt with special attention in order to customize it to a specific requirement.	<b>Anticipate</b> - given advance thought, discussion of treatment to events, trends, consequences or problems; to foresee and deal with in advance  <b>Proactive</b> - to act before a condition or event arises.

### Additional Comments:

- examples described in "Analysis and Problem Solving" and "Planning/Coordinating" sections of the PDF often contain additional information about the required level of service provided to the "customer"

## 8. Communication

	Level 1	Level 2	Level 3	Level 4	Level 5
How	Exchange of routine information	Exchange of information	Explaining and/or interpreting information	Explaining and/or interpreting information	Imparting information
Why		Requires explanation and/or interpretation	Secure understanding. May involve technical information and advice.	<b>Instruct, train</b> and/or <b>gain the cooperation</b> of others	Obtain agreement, where interests may diverge, and/or <b>negotiation</b> skills to resolve complex situations.
Notes to Raters/ Definitions		Information or data that needs to be explained or clarified. Basic technical or administrative information. May be required to deal with minor conflicts or complaints. More complex technical communications where all parties are technically competent.	Explain matters by interpreting policy or theory so that it is fully understood by others. Must consider the communication level/skill of the audience and be sensitive to their abilities and/or limitations. Materials have to be presented using words or examples that make the information understandable for non-experts or people who are not familiar with the intricacies of the information.	<b>Instruct</b> - to give knowledge to or provide authoritative information within a formal setting such as a workshop or lab environment <b>Train</b> - impart knowledge and/or demonstrate skills within a formal instructional setting <b>Gain cooperation</b> - skills needed to possibly having to move others to your point of view and gaining commitment to shared goals; usually there is a preferred outcome or goal. Audience may or may not have divergent views.	<b>Negotiate</b> - authority to commit to a solution or compromise. Works within broad parameters and the preferred outcome is also broadly defined. Agreement is binding on the College. Normally, audience will have divergent views or opposing objectives.

## 9. Physical Effort

	Level 1	Level 2	Level 3
Effort	Light	Moderate	Heavy
Lifting/Pulling/Pushing	less than 5 kg (or 11 lbs)	5 - 20 kg (or 11 - 44 lbs)	greater than 20 kg (or 44 lbs)
Notes to Raters/Definitions	<p>Able to adjust working position to minimize physical stress.</p> <p>Includes occasionally lifting/carrying paper to restock printer or photocopier as part of the normal office etiquette.</p>	<p>Includes:</p> <ul style="list-style-type: none"> <li>- sustained handling of lighter objects (less than 5 kg).</li> <li>- restricted ability to adjust working position for longer periods of time (over 30 minutes) or sustaining awkward work positions for up to 30 minutes.</li> </ul>	<p>Includes:</p> <ul style="list-style-type: none"> <li>- sustained handling of objects less than 20 kg but more than 5 kg.</li> <li>- sustaining awkward work positions for long periods (over 30 minutes).</li> </ul>
		<p>To determine whether the physical effort is "regular &amp; recurring" or "occasional", refer to the "Duties and Responsibilities" section of the PDF.</p> <p>For example, a position spends 15% of the time annually performing a receiving function. The physical effort is best reflected at Level 2, except there is a need to lift boxes weighing up to 50 lbs. To determine whether the lifting is "regular &amp; recurring" or "occasional", the rater must break the physical effort elements down to identify the actual amount of time that lifting occurs annually. For this example, "heavy lifting" occurs throughout the day but in total is less than half a hour a day for 15% of the time. Clearly, this is an example of "occasional" heavy lifting.</p>	

## 10. Audio/Visual Effort

- all activities require a level of concentration
- consider what is the "normal" level of concentration needed for the position
- only evaluate activities where a **higher** than usual/normal level of concentration is required
- if an example states "up to 2 hours to develop and format documents and reports", the following should be considered:
  - analyze whether the example provided is a task or activity
    - in this example, it could be two activities: 1 - develop reports; 2 - format reports or one activity in which developing and formatting means the same
  - examine the activities and determine if a higher than normal level of concentration is needed
  - refer to the "Duties and Responsibilities" section of the PDF for assistance
  - if it's determined that "develop and format documents" is one activity then one must determine how long does it take to do one report and is the same "high" level of concentration needed throughout the entire time
- if an example states "answering emails for more than 2 hours" the following should be considered:
  - while an individual may spend 2 or more hours over the course of the day dealing with emails, rarely would this be a continuous activity requiring higher than normal level of concentration
  - concentration (normal or high) would typically only occur for the time required to answer a single email; therefore interruptions between messages should not be an issue

## 11. Working Environment

- this factor reflects working conditions must be **real** and not a condition that might occur
  
- "verbal abuse" is describe as derogatory or threatening comments. Someone who is angry or upset and yells at the position may not be verbally abusive unless the comments directed to the position are personally threatening and/or demeaning.
  
- as a guide:
  - travel that is a requirement of the position and occurs on a regular basis for more than 10% of the time (eg. equivalent to ½ a day a week or 2½ days per month) should be considered "regular and recurring"
  - a condition that occurs "infrequently" may be not be noteworthy. Consideration must be given to frequency of the occurrence or if there is a number of conditions that occur "infrequently"