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# Directive on Classification

## 1. Effective date

- 1.1 This directive takes effect on April 1, 2021.
- 1.2 This directive replaces the following Treasury Board policy instrument:
  - *Directive on Classification* (April 1, 2020)

## 2. Authorities

- 2.1 This directive is issued pursuant to the same authorities indicated in section 2 of the *Policy on People Management*.

## 3. Objectives and expected results

- 3.1 In addition to the objectives indicated in section 3 of the *Policy on People Management*, the objective of this directive is to support the core public administration in establishing the relative value of work in an equitable, consistent and effective manner.
- 3.2 In addition to the expected results indicated in section 3 of the *Policy on People Management*, the expected results of this directive are as

follows:

- 3.2.1 Classification authority is properly exercised; and
- 3.2.2 Classification decisions are sound, and organizational design and classification activities are well managed.

## 4. Requirements

- 4.1 The head of human resources is responsible for the following:
  - 4.1.1 Ensuring that jobs within the organization are classified in accordance with the *Directive on Classification*, job evaluation standards, occupational group and subgroup definitions, and guidance from the Chief Human Resources Officer;
  - 4.1.2 Ensuring that classification conversion and renaming initiatives are completed within the prescribed timelines and guidance established by the Chief Human Resources Officer;
  - 4.1.3 Ensuring that persons approving classification actions are trained as stipulated by the Chief Human Resources Officer prior to exercising organizational design and classification responsibilities;
  - 4.1.4 Ensuring that standardized and unique job descriptions are used appropriately;
  - 4.1.5 Ensuring that an internal process is established for the resolution of impasses and disagreements in a classification decision;

- 4.1.6 Ensuring that the organizational/departmental level of approval and approval process required for effective dates carrying a long retroactivity period (that is, six months or more) are established;
- 4.1.7 Ensuring that deputy head-directed decisions are used and administered in accordance with the mandatory procedures in Appendix A;
- 4.1.8 Ensuring that all classification actions and decisions are:
  - 4.1.8.1 Tracked and recorded in the organization's human resources system; and
  - 4.1.8.2 Submitted to the Chief Human Resources Officer's human resources systems; and
- 4.1.9 Ensuring that controls are in place for the management of vacant positions.
- 4.2 Managers are responsible for the following:
  - 4.2.1 Successfully completing the required training stipulated by the Chief Human Resources Officer prior to exercising organizational design and classification responsibilities;
  - 4.2.2 Seeking advice from persons accredited in organizational design and classification when proposing changes to their organizational structure and when updating job descriptions;
  - 4.2.3 Providing all information required for rendering a classification decision and for completing classification

actions as described in the *Standard on Classification* (subsection B.2.2.9);

- 4.2.4 Implementing interdepartmental and departmental standardized job descriptions wherever possible;
- 4.2.5 Maintaining accurate organizational structures and current job descriptions for their area of responsibility;
- 4.2.6 Determining the effective date of a job description and justifying the date chosen based on evidence;
- 4.2.7 Participating in job evaluation committees and in job validation reviews, as required; and
- 4.2.8 Ensuring that employees are notified each time a classification decision is rendered for the position they occupy.

4.3 Persons accredited in organizational design and classification and who have delegated classification authority are responsible for:

- 4.3.1 Evaluating jobs and approving classification decisions;
- 4.3.2 Providing organizational design and classification advice; and
- 4.3.3 Participating on job evaluation committees.

4.4 Persons trained in organizational design and classification are responsible for approving classification actions that do not impact or modify a classification decision, including:

- 4.4.1 Creating a position using a standardized job description;

4.4.2 Deleting a position; and

4.4.3 Changing the reporting relationship or title of a position.

## 5. Roles of other government organizations

5.1 The roles of other government organizations in relation to this directive are described in section 5 of the *Policy on People Management*.

## 6. Application

6.1 This directive applies to the organizations listed in section 6 of the *Policy on People Management*.

6.2 This directive does not apply to positions classified in the Executive (EX) Group.

6.3 This directive does not apply to persons appointed by the Governor in Council, to members of the Royal Canadian Mounted Police, or to members of the Canadian Armed Forces.

## 7. References

7.1 Legislation

- *Canadian Human Rights Act*, subsection 11(2).
- *Financial Administration Act*, section 7 and subsection 11(1)
- *Public Service Employment Act*, section 30(2).
- *Public Service Rearrangement and Transfer of Duties Act*

7.2 Related policy instruments

- *Directive on Classification Oversight*
- *Directive on Classification Grievances*
- Job evaluation standards
- Occupational group and subgroup definitions

### 7.3 Other

- Organization and Classification Learning Curriculum
- Proactive Disclosure – Position Reclassifications

## 8. Enquiries

- 8.1 Human resources advisors should direct enquiries about this directive to their departmental human resources office.
- 8.2 For interpretation of any aspect of this directive, contact Treasury Board of Canada Secretariat Public Enquiries.
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## Appendix A: Mandatory Procedures for Use and Administration of Deputy Head–Directed Classification Decisions

### A.1 Effective date

- A.1.1 These procedures take effect on April 1, 2020.
- A.1.2 These procedures replace the following instrument:
- *Directive on Classification*, Appendix J: Deputy Head–Directed Classification Decisions (July 1, 2015)

## A.2 Procedures

- A.2.1 These procedures provide details on the requirements set out in subsection 4.1.7 of the *Directive on Classification*.
- A.2.2 Deputy head-directed decisions used in the circumstances described in subsection A1.2 of the *Policy on People Management* must:
  - A.2.2.1 Be documented in the classification file;
  - A.2.2.2 Contain the deputy head's authorization;
  - A.2.2.3 Be assigned a new job and position number;
  - A.2.2.4 Be identified in the departmental human resources system as not to be used for relativity purposes and not to be replicated; and
  - A.2.2.5 Be deleted when the incumbent vacates the position.
- A.2.3 For purposes of subsection A1.2.2 of the *Policy on People Management*, prior to making a directed decision, detailed proposals for organizational design and classification innovation solutions must be submitted to the Chief Human Resources Officer for approval that include:
  - a. The objectives and expected benefits of the organizational design and classification innovation solution;
  - b. A risk assessment;
  - c. Proposed mitigation measures;
  - d. The duration with a specific end date; and

- e. Performance measures, indicators and processes that will be used to evaluate and report on the success of the innovation solution.

## Appendix B: Standard on Classification

### B.1 Effective date

- B.1.1 This standard takes effect on April 1, 2020.
- B.1.2 This standard replaces the following Treasury Board policy instruments:
  - *Policy on Classification* (July 1, 2015)
  - *Directive on Classification* (July 1, 2015)

### B.2 Standards

- B.2.1 This standard provides details on the requirements set out in section 4 of the *Directive on Classification*.
- B.2.2 Standards are as follows:

#### **Job descriptions**

- B.2.2.1 Job descriptions must be written concisely in bias-free plain language, contain all significant aspects of the work assigned to the job, and include:
  - The organizational context, mandate and supervisor–subordinate relationships;



- A title that reflects the functions and nature of the work described; and
- The manager's signature and the date the job description was signed.

B.2.2.2 The following identifying information must appear in the job description:

- Job number;
- Position number;
- Authorized group and level;
- National Occupational Classification (NOC) code;
- Effective date;
- Organization/department;
- Branch/division;
- Geographic location;
- Official languages, security and communication requirements; and
- Supervisor's position number, group and level.

B.2.2.3 A new or updated job description is required in the following circumstances:

- When significant changes in the work occur; or
- When new work is assigned.

## **Reclassification**

B.2.2.4 A job evaluation that results in a change in the occupational group, subgroup (if applicable), or

the level of an existing job or position is considered to be a reclassification and may occur only as a result of:

- Central agency or organizational oversight;
- A grievance decision;
- A correction of an error;
- A substantial change in duties or responsibilities;
- Legislative changes that result in new program requirements;
- Central agency or departmental policy that results in changes to existing programs or changes to organizational mandates;
- Reorganization of work; and
- Natural evolution of work within the same work continuum.

B.2.2.5 The following situations do not constitute a reclassification:

- Jobs/individuals are transferred from non-core public administration organizations to the core public administration pursuant to the block transfer provisions of the *Public Service Employment Act* as a result of an order under the *Public Service Rearrangement and Transfer of Duties Act*;

- Jobs/individuals are transferred by legislation to the core public administration; and
- There is a change to the minimum qualifications established in accordance with subsection 30(2) of the *Public Service Employment Act*.

## **Job evaluation committee**

B.2.2.6 At a minimum, a job evaluation committee is required when:

- Evaluating standardized job descriptions;
- Using an occupational group or subgroup for the first time in an organization;
- The evaluation outcome may have a significant impact on departmental and interdepartmental relativity or result in a significant increase of salary expenditures;
- There is the likelihood of a reclassification; and
- The evaluation outcome could be contentious or precedent-setting.

B.2.2.7 A job evaluation committee is comprised of:

- At least one member who is designated as the Chair;

- A minimum of three rating members who are trained in job evaluation including one who is delegated in organizational design and classification;
- One or more rating members who represent(s) the organizations that use the interdepartmental standardized job description, if applicable; and
- Members who are not in a potential conflict of interest.

## **Job validation**

B.2.2.8 A job validation review is required when:

- A proposed or possible reclassification may occur; and
- A better understanding of the job is needed.

## **Documentation and data management**

B.2.2.9 At a minimum, the following documentation is required to substantiate a classification decision and must be retained in the classification file:

- A job description, signed and dated by the manager, that describes the duties and responsibilities of the position and indicates the effective date;

- An organizational chart, signed and dated by the manager, that depicts the organizational location of the position and its relationship to the other positions in the same unit or division;
- The classification action form (“Expanded Position Activity Report”), signed by a person accredited with delegated classification authority;
- A job evaluation rationale, signed and dated, that substantiates the classification decision;
- An analysis and summary of the relevant classification relativity;
- The job validation report, if a job validation review was conducted; and
- Any other information that supports the effective date.

B.2.2.10 For reclassification decisions, the following documentation must also be retained:

- A statement from the manager summarizing the evolution of the work.

## Proactive disclosure

B.2.2.11 Classification decisions that result in the reclassification of an occupied position are subject to proactive disclosure and must be uploaded to the human resources system on a quarterly basis.

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