YORK UNIVERSITY

POINT-FACTOR JOB EVALUATION SYSTEM

# INTRODUCTION

All jobs are evaluated on the basis of the following eight factors:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| FACTORS | SKILL | EFFORT | RESPONSIBILITY | WORKING CONDITIONS |
| 1. Basic Knowledge | X |  |  |  |
| 1. Communications  * Nature * Purpose * Language Skills | X |  |  |  |
| 1. Complexity |  | X |  |  |
| 1. Physical/Sensory Effort |  | X |  |  |
| 1. Assets, Information and Programs |  |  | X |  |
| 1. Consequence of Errors |  |  | X |  |
| 1. Responsibility for Others  * Personnel Authority * Number Supervised |  |  | X |  |
| 1. Context of Work  * Environment * Hazards |  |  |  | X |

Each factor is divided into levels which are directly associated with defined point values.

# INSTRUCTIONS

1. It is important to focus on the job being considered and not the individual incumbent(s).
2. In some of the questions, you will be asked to indicate ALL items that apply or to check the ONE BEST statement from those available. In addition, it is ESSENTIAL that you provide RELEVANT, SPECIFIC EXAMPLES that clarify your responses.
3. As you work through the questionnaire, please refer to the definitions of words appearing in italics that appear in alphabetical order in a GLOSSARY at the end of the questionnaire.
4. In several sections, you are asked to consider how often certain tasks are performed. When choosing the statement consider the following:
   1. The job on an average day or week

AND

* 1. If the duties vary greatly, try to describe the work over a year.

The following designations are to help determine how frequently a task may be performed:

|  |  |
| --- | --- |
| NEVER/RARELY | Not at all or infrequently. |
| OCCASIONALLY | Less than 25% of the time on the job, for instance:   * Up to 2 hours a day, or * 1 full day a week, or * 4 full days a month, or * 3 months per year |
| REGULARLY | At least 25% but no more than 50% of the time on the job, for instance   * 2 to 3.5 hours a day, or * About 2.5 full days a week, or * About 6 to 10 full days a month, or * 3 to 6 months per year |
| FREQUENTLY | More than 50% of the time on the job, for instance:   * 4 to 7 hours a day, or * 3 to 5 full days a week, or * 11 or more full days a month, or * 6 to 12 months per year |

|  |
| --- |
| **For use by Human Resources** |
| Questionnaire: |
| Salary Band: |
| Date Completed: |

# JOB EVALUATION OVERVIEW

1. WHAT IS THE PURPOSE OF THIS JOB?
2. MAJOR AREARS OF RESPONSIBILITY

List major duties in order of importance and indicate approximate percentage of time. (Total to 95%.)

Other Duties as Assigned – 5%

# FACTOR I BASIC KNOWLEDGE

This factor measures the degree of skill or level of knowledge or specific abilities required for the competent performance of the job. Knowledge, skills, and abilities include those which are scientific or learned, practical, trade, commercial, administrative or clerical and may be acquired through formal training, work experience, self-study, life experience or some combination thereof. This factor is characterized by:

* The minimum level of knowledge, skills, abilities and/or experience (e.g. volunteer, internship, hobbies, etc.) required to effectively perform the job functions. (Levels 5, 6, & 7 below assume an educational base of a high school diploma or its equivalent).
* Experience is prior related employment or unpaid work experience (e.g. volunteer, internship, hobbies, etc.) gained in lower-level or related jobs (within the organization or with other organizations). It is important to keep in mind the separation between the background of the individual(s) holding the job and the requirements of the job itself. It is the **latter** which are evaluated.

FACTOR LEVELS (8)

1. What is the minimum requirement for the job? (**INDICATE ONEuj**)

|  |  |
| --- | --- |
|  | (1) Ability to recognize, differentiate and comprehend numbers and basic symbols. Ability to comprehend and follow oral instructions, perform repetitive manual tasks, operate simple equipment or hand tools. |
|  | (2) Sufficient basic literacy and arithmetic/language skills to apply standard office rules and procedures or ability to develop proficiency in the operation of equipment requiring three weeks or less training. |
|  | (3) Proficiency in techniques or procedures requiring special training or on-the-job experience typical of 9 to 10 years of formal schooling and 2 to 3 years' experience, or basic high school diploma with some experience, for purposes of performing numerous standardized tasks or operations. May require ability to meet the public, communicate information with clarity, operate specialized equipment or utilize specific skills. |
|  | (4) Working knowledge of English, math, business or current events which is typical of a high school diploma plus additional training or 1 to 2 years' related experience within a specialized field. |
|  | (5) Proficiency in a specialized field typically requiring some community college, or advanced training, or advanced work-related experience (e.g., 2 to 3 years). |
|  | (6) Proficiency in a technique or discipline which involves understanding of technical or administrative practices and principles equivalent to community college with some related experience, or 3 to 5 years' related work experience. |
|  | (7) Sufficient knowledge of an extensive body of rules, procedures, methods and operations or working knowledge of a particular discipline typically attained through 4 to 6 years' related work experience, or community college plus several years of related work experience, or a university degree plus 1 to 2 years of related work experience in order to apply the concepts, methods and procedures to practical situations |
|  | (8) Mastery of a specialized or administrative field and/or ability to manage others in varied fields. Requires a broad knowledge of a variety of administrative or highly technical fields, or extensive knowledge of a specialized field, typically attained through 7 to 10 years' related experience, or a university degree plus several years of related work experience. |

Provide an explanation, as to why this level is necessary, in support of your selection. Indicate how the skills and abilities are applied in performance of the primary duties.  
  
<<[context.value(“${jeqObj.JEQ.JEQ.Factor\_1.INC.exp}“)]>>

# FACTOR II COMMUNICATIONS

These subfactors measure the relative level of typical human interaction involved in any particular job, including listening, interpreting, counselling, influencing, speaking, or sending email in order to convey or receive information. There are three distinct elements of interpersonal skills which are to be evaluated and credited independently: Nature, Purpose, and Language Skills.

## NATURE

This subfactor measures the requirement for the incumbent(s) to deal with individuals, either in person or by telephone, to accomplish work objectives. Considered are who is contacted, such as other university employees, outside organizations, students, and/or the general public, and what the contact involves.

This subfactor is characterized by:

* communications with people in the performance of duties.
* type and level of contacts.
* confidentiality and sensitivity.

SUBFACTOR LEVELS (9)

1. How many people (students, faculty, staff, external) does the incumbent in this job communicate with on an average day? (**INDICATE ONE**)

|  |  |  |  |
| --- | --- | --- | --- |
|  | (01) None |  | (04) 26 to 50 |
|  | (02) Fewer than 10 |  | (05) More than 50 |
|  | (03) 10 to 25 |  |  |

1. What is the nature of the primary contacts with individuals?

**INDICATE ALL THAT ARE APPLICABLE** - using the letter 'O' for Occasionally, 'R' for Regularly, and 'F' for Frequently as defined on page 3.

|  |  |
| --- | --- |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q3\_1[0] }“)]>> | (1) Primarily internal with employees in the immediate work area or in related work units within a department. Contacts with the public or students are incidental, rather than integral, to the job. |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q3\_2[0] }“)]>> | (2) Contacts match most of the preceding level (1) and significant elements of the next level (3). |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q3\_3a[0] }“)]>> | (3) a) Varied, including those with employees in other departments and/or outside organizations. These contacts may involve limited problem situations and are typically cordial. |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q3\_3b[0] }“)]>> | (3) b) With the students/staff/faculty or the public are typically on demand, routine and involve large numbers. |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q3\_4[0] }“)]>> | (4) Contacts match most of the preceding level (3) and significant elements of the next level (5). |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q3\_5a[0] }“)]>> | (5) a) With individuals or groups within or outside the university. Significant interaction with others and skill in interpreting information and presenting ideas are necessary. Communications are largely straightforward and/or non-controversial. |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q3\_5b[0] }“)]>> | (5) b) With the public or students are on demand or on an on-going basis. Interviewing or questioning is required to determine nature of service required and/or provided. |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q3\_5c[0] }“)]>> | (5) c) With the students or the public typically involve large numbers, are on demand, and are sensitive and/or *adversarial*. |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q3\_6[0] }“)]>> | (6) Contacts match most of the preceding level (5) and significant elements of the next level (7). |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q3\_7[0] }“)]>> | (7) With individuals or groups within or outside the university and are highly confidential and significant. These contacts are of a sensitive nature and/or  *adversarial*. |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q3\_8[0] }“)]>> | (8) Contacts match most of the preceding level (7) and significant elements of the next level (9). |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q3\_9[0] }“)]>> | (9) Require a thorough working knowledge of protocol and the political climate. Regular contacts are with community, government or corporation leaders and/or university legislative bodies (Senate, Board of Governors) where particular skill and sensitivity to political aspects of interactions are indispensable to provide good relations and promote the best interests of the University. |

Provide examples and explanation, as to why this level is required, in support of your selection.

<<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.exp}“)]>>

## PURPOSE

This subfactor measures the reason, scope and intensity of the primary contacts, such as providing information, counselling, enlisting cooperation, or negotiating. The importance and consequence of the contacts are considered.

This subfactor is characterized by:

* objectives of contacts
* confidentiality and sensitivity
* emotional content of contact
* interpersonal conflict

SUBFACTOR LEVELS (9)

1. In this job, what is the primary purpose for contacting people?

**INDICATE ALL THAT ARE APPLICABLE** - using the letter 'O' for Occasionally, 'R' for Regularly, and 'F' for Frequently as defined on page 3.

|  |  |
| --- | --- |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2B.INC.Q4\_1a[0] }“)]>>context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q4\_1a[0] }“)]>> | (1) a) To accomplish work of self or others through the basic interchange of information, as necessary, relating to employee's duties. |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2B.INC.Q4\_1b[0] }“)]>>context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q4\_1b[0] }“)]>> | (1) b) Contacts made in transporting materials. |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2B.INC.Q4\_2[0] }“)]>>context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q4\_2[0] }“)]>> | (2) Contacts match most of the preceding level (1) and significant elements of the next level (3). |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2B.INC.Q4\_3[0] }“)]>>context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q4\_3[0] }“)]>> | (3) To provide services by obtaining, clarifying, or giving information concerning routine matters relating to work of the University, its practices and services. |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2B.INC.Q4\_4[0] }“)]>>context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q4\_4[0] }“)]>> | (4) Contacts match most of the preceding level (3) and significant elements of the next level (5). |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2B.INC.Q4\_5a[0] }“)]>>context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q4\_5a[0] }“)]>> | (5) a) To *facilitate* work processes or services through contacts requiring enlisting  cooperation or *informal information gathering*. |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2B.INC.Q4\_5b[0] }“)]>>context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q4\_5b[0] }“)]>> | (5) b) To instruct and advise others *in-depth* on policies and procedures. |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2B.INC.Q4\_6[0] }“)]>>context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2B.INC.Q4\_7a[0] }“)]>>context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q4\_6[0] }“)]>> | (6) Contacts match most of the preceding level (5) and significant elements of the next level (7). |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2B.INC.Q4\_7a[0] }“)]>>context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2B.INC.Q4\_7b[0] }“)]>>context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q4\_7a[0] }“)]>> | (7) a) To plan, coordinate, and/or *facilitate* a process, or to provide a service in varied, non-routine situations. |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2B.INC.Q4\_7b[0] }“)]>>context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2B.INC.Q4\_8[0] }“)]>>context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q4\_7b[0] }“)]>> | (7) b) *In-depth interviewing* toward providing a service or producing a written product. |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q4\_8[0] }“)]>> | (8) Contacts match most of the preceding level (7) and significant elements of the next level (9). |
| <<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2B.INC.Q4\_9[0] }“)]>>context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2A.INC.Q4\_9[0] }“)]>> | (9) To *counsel*, *negotiate* or persuade others to obtain desired results. These interactions involve issues which are of substantial importance to the University or have a high degree of effect upon an individual. |

Provide examples and explanation, as to why this level is required, in support of your selection.

<<[context.value(“${jeqObj.JEQ.JEQ.Factor\_2.Factor\_2B.INC.exp}“)]>>

## LANGUAGE SKILLS:

This subfactor measures the requirement for the incumbent(s) to use two or more languages (other than English) and the level of proficiency in the language required.

SUBFACTOR LEVELS (4)

It is important to separate the incumbent's knowledge and ability to communicate in language(s) and those which are REQUIRED for the job itself. It is the latter which are evaluated.

1. Does this job require knowledge of a language or languages (other than English)?

|  |  |
| --- | --- |
|  | No. Go to question #7. |
|  | Yes. please specify which language(s) including a brief rationale as to why it is required for this job: |

|  |  |  |  |
| --- | --- | --- | --- |
| A. | Click or tap here to enter text. |  | Why:Click or tap here to enter text. |
| B. | Click or tap here to enter text. |  | Why:Click or tap here to enter text. |
| C. | Click or tap here to enter text. |  | Why:Click or tap here to enter text. |

1. Please check the appropriate level for each language as specified in question #5 above.

**INDICATE THAT ARE APPLICABLE** - using the letter 'O' for Occasionally, 'R' for Regularly, and 'F' for Frequently as defined on page 3.**ALL**

|  |  |  |  |
| --- | --- | --- | --- |
| **A.** | **B.** | **C.** | **Refers to languages in question 5.** |
|  |  |  | (02) a) Required to have a basic reading knowledge of another language (e.g., scanning various texts to pick out specific elements of information, such as names, dates, numbers; reading forms such as course changes or work orders in order to process them). |
|  |  |  | (02) b) Required to have basic writing skills in another language (e.g., writing brief notes; giving simple information such as messages, class cancellations; filling in forms). |
|  |  |  | (02) c) Required to speak another language at a basic level (e.g., asking and answering questions, exchanging simple factual information). |

|  |  |  |  |
| --- | --- | --- | --- |
| **A.** | **B.** | **C.** | **Refers to languages in question 5.** |
|  |  |  | (03) a) Must be able to comprehend written matter in another language (e.g., extracting information from reference materials; reading reports and other documents to extract details; reading correspondence to take note of items requiring action). |
|  |  |  | (03) b) Required to write non-complex functional documents in another language (e.g., preparing factual information bulletins; preparing short routine administrative correspondence to explain or request action; summarizing a text or meeting in point or note form). |
|  |  |  | (03) c) Must be able to sustain a conversation in another language on concrete topics (e.g., participating in informal meetings and work sessions; providing information on activities, procedures and events). |
|  |  |  | (04) a) Must be able to fluently comprehend text in another language dealing with a wide variety of topics where complex details, inferences and fine points of meaning are understood (e.g., reading policy papers, research or technical reports to assess, comment or recommend; reading in-depth documents such as regulations for action or interpretation). |
|  |  |  | (04) b) Required to compose documents in another language where ideas are developed and presented coherently (e.g., drafting reports or recommendations, research papers or summaries; preparing a summary of meetings or documents; editing text). |
|  |  |  | (04) c) Required to sustain an in-depth conversation in another language, requiring the understanding or expression of subtle, abstract or complicated ideas (e.g., discussing policies, programs or services; participating in discussions which involve a rapid exchange of ideas; dealing with situations which require quick and accurate use of two or more languages in rapid succession. |

Provide examples and explanation, as to why this level is required, in support of your selection.

# FACTOR III COMPLEXITY

This factor measures the requirement for decision making and ranges from simple reasoning to complex problem solving through inferential reasoning. Consideration is also given to the analytical, cognitive, and critical thinking skills required to perform the duties, as well as conceptual development of techniques, procedures, and policies.

This factor is characterized by:

* problem identification, analysis and interpretation
* mental challenge
* comparisons and discrimination of relational information
* concrete and abstract reasoning

FACTOR LEVELS (7)

1. What level of decision-making and judgement is required in order to perform the primary functions, as indicated in the Job Overview? **(INDICATE ONE)**

|  |  |
| --- | --- |
|  | (1) Duties involve performance of tasks that are repetitive, well defined and clear-cut with specific guidelines under close and/or constant review, leaving little opportunity for individual judgement. Little or no creativity is required to carry out assigned duties. |
|  | (2) Duties are limited in scope, generally well defined with established procedures. Duties involve similar situations requiring solution by discriminating choice of predefined actions. Incumbent(s) normally performs independently, with supervision readily available. |
|  | (3) Duties require a choice from among relevant specialized, technical or administrative knowledge and procedures in situations which present some new data, but which generally conform to established patterns and practices. Some *improvisation* on *isolated problems* may be required in order to determine course of action. More complex problems are referred to supervisor for clarification. |
|  | (4) Duties match most of the preceding level (3) and significant elements of the next level (5). |
|  | (5) Procedures and policies provide general parameters for judgement. Assigned responsibilities present variable and/or competing situations requiring evaluative or  *interpretive thinking* in order to choose course of action. Solutions/decisions/ actions may vary according to the depth and diversity of the situations involved. Refers only specific problems to supervisor for direction or resolution. |
|  | (6) Duties match most of the preceding level (5) and significant elements of the next level (7). |
|  | (7) Policies provide general parameters for judgement, although established procedures may be few. Nature of duties may require the ability to analyze, evaluate and *synthesize* highly variable and frequently *ill-defined* technical or administrative problems. Participates in the conception, development or administration of technical procedures, or administrative plans and programs. Responsibilities may require researching, planning, integrating, anticipating or reacting to complex technical, organizational, or administrative issues, recommendations or decisions. Managerial review is usually after the fact or regarding interpretation of or exception to established policy. |

Provide examples and explanation, as to why this level is required, in support of your selection and reflective of the primary functions.

Consider the writing requirements of the job, the amount of discretion/review, kind of problems resolved, the kinds and importance of decisions made, independence you have in implementation of solution, etc.

<<[context.value(“${jeqObj.JEQ.JEQ.Factor\_3.INC.exp}“)]>>

# FACTOR IV PHYSICAL/SENSORY EFFORT

This factor measures the degree to which the job requires the incumbent(s) to perform work which is physically demanding in terms of physical activities or sensory attention on a regular and recurring basis. Consideration is given to the intensity, frequency, and duration of the effort required. If a job has four or more characteristics of a given level, the job should be matched to the next higher level because of the cumulative aspect.

This factor is characterized by:

* physical effort
* mental concentration
* sensory effort (hearing, seeing, smelling, touching, tasting)
* exertion
* strength, endurance, stamina and fatigue
* use of fingers, hands or fine finger movements
* attention demands

FACTOR LEVELS (9)

1. What is the degree of regular and recurring physical/sensory effort required for this job? **(INDICATE ALL THAT ARE APPLICABLE)**

|  |  |
| --- | --- |
|  | (1) Work is basically sedentary; worker sits comfortably to do the work and is free to move about. Routine awareness of surrounding environment is required. There may be some walking, standing, bending, carrying of *light* items, infrequent driving of a vehicle required, use of video display terminals (VDTs), etc. |
|  | (2) Efforts match an element from level (3) but only performed irregularly or infrequently. |

Level 3 is for effort expended Occasionally - as defined on Page 3

|  |  |
| --- | --- |
|  | (3) a) Sensory attention and information processing must be more acute or enduring than is required for most aspects of daily life. |
|  | (3) b) *Light* physical or sensory effort which results in some noticeable fatigue. |
|  | (3) c) *Rapid* and sustained use of hands or fingers. |
|  | (3) d) *Fine finger movements* for tuning and repairing equipment. |
|  | (3) e) *Recurring* pushing, turning, and/or lifting of objects up to 9 kg. (20 lbs.) or occasionally up to 22.5 kg. (50 lbs.) |
|  | (3) f) Use of *light* hand tools and handling light materials manually. |
|  | (3) g) *Rapid* and *sustained* use of arms to operate equipment or perform work. |
|  | (4) Four or more of level (3). |

Level 5 is for effort expended Regularly - as defined on page 3.

|  |  |
| --- | --- |
|  | (5) a) *Intermittent* unusual specific acuity and/or durability of one or more of the major senses on a *prolonged* basis. |
|  | (5) b) Relief from tasks is restricted by location or available replacement. |
|  | (5) c) *Intermittent* moderate physical strength, such as climbing and working from ladders or in other awkward positions. |
|  | (5) d) *Intermittent* walking up and down stairs or bending. |
|  | (5) e) *Intermittent* rapid use of fingers; on-going, production-oriented use of keyboard devices; or *fine finger movements* to a very close tolerance where accuracy is essential. |
|  | (5) f) *Intermittent* periods of standing or sitting in one position. |
|  | (5) g) *Intermittent* pushing, turning, and/or lifting of objects up to 22.5 kg. (50 lbs.) or occasional lifting of objects up to 45 kg. (100 lbs.) |
|  | (5) h) *Intermittent* monitoring of machinery or equipment. |
|  | (6) Four or more of level 5. |

Level 7 is for effort expended Frequently - as defined on page 3.

|  |  |
| --- | --- |
|  | (7) a) *Sustained unusual specific acuity* and/or durability of one or more of the major senses on a sustained basis. |
|  | (7) b) *Sustained* moderate physical strength, such as climbing and working from ladders or in other awkward positions. |
|  | (7) c) Constant walking up and down stairs or bending. |
|  | (7) d) *Prolonged rapid* use of fingers; on-going, production-oriented use of keyboard devices; or fine finger movements to a very close tolerance where accuracy is essential. |
|  | (7) e) Long periods of standing or sitting in one position. |
|  | (7) f) *Recurring* pushing, turning, and/or lifting of objects up to 22.5 kg. (50 lbs.) or occasional lifting of objects up to 45 kg. (100 lbs.). |
|  | (7) g) *Prolonged* monitoring of machinery or equipment. |
|  | (8) Four or more of level 7. |
|  | (9) Work requiring exceptional physical strength or stamina, or continual physical exertion. *Recurring* pushing, turning, and/or lifting of objects up to 45 kg. (100 lbs.) or occasional lifting of objects over 45 kg. (100 lbs.) |

Provide examples and explanation, as to why this level is required, in support of your selection. Please indicate the frequency (estimate percentage) of these activities.

<<[context.value(“${jeqObj.JEQ.JEQ.Factor\_4.INC.exp}")]>>

# FACTOR V ASSETS, INFORMATION AND PROGRAMS

This factor measures the nature of responsibility for assets, programs, or information. The following are considered: the dollar amount of assets (which may include facilities, equipment/ machinery, records, budgets); maintenance or development of information; or breadth of programs and their relationship to the overall mission of the University.

This factor is characterized by:

* overall accountability given the nature of the work
* machinery, equipment, and systems
* monitoring, cataloguing, filing of paperwork
* record keeping, files, bookkeeping
* accuracy, confidentiality of data
* cash accounts
* budgets, inventories, procurements - tracking, proposing, overseeing
* commitments, property, money or records
* program development, execution
* programmatic responsibility
* policy development, implementation

FACTOR LEVELS (7)

1. What is the level of responsibility for assets, information and programs required in this job? **(INDICATE ONE)**

|  |  |
| --- | --- |
|  | (1) Care is exercised in the performance of duties and in using equipment and material. |
|  | (2) Care is exercised in the performance of duties. Responsibilities include the  safekeeping of equipment, machines, or vital records while in use. May handle small daily cash accounts or monitor, catalogue, or file paperwork related to programs, policies, services, or budgets. There is no responsibility to judge the accuracy of facts or figures. |
|  | (3) *Moderate* responsibility and expectation to effect the maintenance and repair of machinery/equipment; maintain unit/ section inventory and/or procedural/operating manuals; ensure the accuracy, manipulation, and/or updating of records and information; *monitor an area budget(s)*; maintain and safeguard the confidentiality of *sensitive* records; or process, search for, or develop information sources. May *facilitate* others' work through provision of services or completion of work products which require organization and coordination. |
|  | (4) Responsibilities are generally shared but *integral and substantive*. May make purchasing decisions of moderate scope; effectively carry out programs through the direct provision of services to the public, students, or employees; organize, coordinate, and *facilitate* the actual application of a project, system or segment of a program; or *monitor a program/department budget(s)*. May process, search for, and/or maintain information that provides services directly to other employees or that produces a final product used by others. |
|  | (5) Responsibilities include projects, systems or programs within a unit. May be responsible for the development of policies and procedures relating to guidelines that determine the use or disuse of machines and/or equipment; or significant change to a program within a unit; purchases of *major* scope; or for organizing, coordinating and facilitating the actual application of a program or delivery of services. May involve developing and *administering a program budget*. |
|  | (6) Responsibilities match most of the preceding level (5) and significant elements of the next level (7). |
|  | (7) May develop and/or plan programs and budgets that support operations or services and affect a wide range of people. May have shared responsibility for overseeing the operation of a unit and/or *administering the budget* of a unit. May be responsible for initiating, recommending and implementing policies and procedures, or creating or developing a unique product(s), related to a program or service for a unit or functional area. |

Provide examples and explanation, as to why this level is required, in support of your selection. Specify the kind of services, programs or budgets (including dollar value) for which this job may have day-to-day responsibility although ultimate responsibility may rest at a higher level. Also indicate which responsibilities are shared and with whom (job titles).

<<[context.value(“${jeqObj.JEQ.JEQ.Factor\_5.INC.exp}")]>>

# FACTOR VI CONSEQUENCES OF ERRORS

This factor measures the consequence of errors as a result of actions or decisions taken by the incumbent(s) and for which he/she is held responsible. Consideration is given to the degree to which the work is verified or checked, either in succeeding operations, by the procedures themselves, or by supervision, along with the probable effect of errors or actions/decisions upon people, operations or image of the University.

This factor is characterized by:

* degree of review and ease of detection
* span of effect
* cost of errors (e.g., equipment, material waste, labour)
* impact upon the organization (e.g., operations, perceived image, good will, system downtime/lost time)
* impact upon safety of others

FACTOR LEVELS (7)

1. What is the impact of possible errors in this job? **(INDICATE ONE)**

These are potential errors that can occur in the job and are not a reflection of the incumbent(s).

|  |  |
| --- | --- |
|  | (1) Can be readily detected and have little or no effect upon the operations, image or profitability of the unit. |
|  | (2) Readily detected and limited to minor, easily corrected interruptions in routine processes involving minimal loss of time or cost. |
|  | (3) Have a moderate effect and are usually discovered as a result of the thoroughness of direct checking and reviewing procedures or in succeeding operations where most of work is verified. Probable consequences of errors could include slowdown in service or the provision of erroneous information, some embarrassment, or time loss caused through involvement of others. May have cursory, highly limited exposure to privileged information. |
|  | (4) Consequences match most of the preceding level (3) and significant elements of the next level (5). |
|  | (5) Usually are not subject to direct verification or check and have an important effect upon the operations, or image or profitability of the unit. Possible errors could cause significant delays or losses through damage to facilities, equipment, or loss of materials; result in cash losses through mistakes in preparation of charge, billing, or fiscal information; or impair delivery of important services to individuals. May have routine access to privileged or social information or information regarding personnel, or employee compensation, or student records, or routine plans, etc. Errors impact on individuals, or facilities, or costs, or image of the University but generally do not affect large groups of people, procedures or processes. |
|  | (6) Consequences match most of the preceding level (5) and significant elements of the next level (7). |
|  | (7) Errors in technique or judgement would be difficult to detect and would require longer periods of time to become evident. Normally involve decisions not subject to detailed review and have a major effect upon the operations, or image or profitability of the unit. Examples might include excessive costs or expenditures through inefficient supervision or administration or use of resources; serious harm to individuals; or loss of confidence by the public. Errors could result in adverse impact on groups of people or processes or programs. |

Provide examples and explanation, as to why this level is required, in support of your selection.

<<[context.value(“${jeqObj.JEQ.JEQ.Factor\_6.INC.exp}")]>>

# FACTOR VII RESPONSIBILITY FOR OTHERS

This factor measures the responsibility for the supervision and direction of employees in achieving organizational objectives. The factor contains two subfactors: Personnel Authority and Numbers Supervised or Directed.

## PERSONNEL AUTHORITY

This subfactor measures the degree of work direction provided and whether recommendations are made regarding hiring, firing, discipline, promotions, performance appraisals, and other official personnel administration matters. Incumbents may have day-to-day responsibility although ultimate responsibility may rest at a higher level.

This subfactor is characterized by:

* supervision exercised
* latitude in making personnel-related decisions

## NUMBER SUPERVISED OR DIRECTED

This subfactor measures the total number of regularly¬ scheduled full-time, sessional and continuing part-time personnel who are directed or supervised (both directly and indirectly). Credit is awarded for part-time employees on a full-time equivalency basis as well as for those who direct only casual staff.

SUBFACTOR LEVELS (6)

1. Which supervisory functions are part of this job? **(INDICATED ONE)**

|  |  |
| --- | --- |
|  | (1) No responsibility for supervising or directing the work of others.  GO TO NEXT FACTOR LEVEL. |
|  | (2) Acts as lead worker to casual staff in the same work unit by giving direction or instruction in work activities. Please indicate: |

|  |  |  |  |
| --- | --- | --- | --- |
| How many people? | Click or tap here to enter text. | How long (period of time)? | Click or tap here to enter text. |

|  |  |
| --- | --- |
| For what occasions? | Click or tap here to enter text. |

|  |  |
| --- | --- |
|  | (3) Participates in the work and acts as lead worker to continuing full-time, *sessional*, or *part-time* staff in the same work unit by giving direction or instruction in work activities. Responsibility for supervising or directing the work of others is not a regular part of the job. |

|  |  |  |  |
| --- | --- | --- | --- |
| How many people? | Click or tap here to enter text. | How long (period of time)? | Click or tap here to enter text. |

|  |  |
| --- | --- |
| For what occasions? | Click or tap here to enter text. |

|  |  |
| --- | --- |
|  | (4) Responsibility for supervising the work of casual or *work/study student* is a regular or *recurring* part of the job. Includes responsibilities outlined at Level 2 in addition to: coordinating work flow, arranging work schedules, reviewing work, and providing information or suggestions on personnel matters. |

|  |  |  |  |
| --- | --- | --- | --- |
| How many people? | Click or tap here to enter text. | How long (period of time)? | Click or tap here to enter text. |

|  |  |
| --- | --- |
| For what occasions? | Click or tap here to enter text. |

|  |  |
| --- | --- |
|  | (5) As functional supervisor participates in the work while giving direction or instruction regarding work activities to continuing full time, *sessional* or *part-time* staff in the same work unit or the same work project. May be expected to provide information or suggestions on personnel matters.   Please indicate for how many people below: |
|  | a) From 1 to 3 people. |
|  | b) From 4 to 6 people. |
|  | c) From 7 to 10 people. |
|  | d) More than 10 people. |
|  | (6) Supervises a work unit or a division. Assigns, directs and evaluates the work of other employees in the same work unit. Participates in personnel decisions by providing formal recommendations on a variety of personnel administrative matters.  Please indicate for how many people below: |
|  | a) From 1 to 3 people. |
|  | b) From 4 to 6 people. |
|  | c) From 7 to 10 people. |
|  | d) More than 10 people. |

Provide examples and explanation, as to why this level is required, in support of your selection.

<< [context.value(“${jeqObj.JEQ.JEQ.Factor\_7.INC.Q11.exp}") ] >>

If these responsibilities are shared, indicate with which jobs (titles) they are shared

# FACTOR VIII CONTEXT OF WORK

This factor measures adverse conditions under which the work must be performed. To be credited, these conditions must be inherent to the job and be a hiring requirement, OR, be present AT LEAST 25% of the time. The work could not be performed without subjecting the incumbent(s) to the conditions. There are two components which are to be evaluated independently: Environment and Hazards.

## A. ENVIRONMENT

This subfactor measures the discomforts or unpleasantness necessary to the work environment and which may affect the incumbent(s)' physical or emotional well-being. If three or more environmental characteristics of a job match level 3, the match should be made to level 4.

Note: this subfactor does not consider defects in the particular physical plant if those defects are not required to do the job. For instance, if the building's air conditioner is not working properly, this does not constitute a compensable unpleasant working condition. Exposure to weather conditions does not include occasional delivery to other buildings.

This subfactor is characterized by:

* disagreeable surroundings
* work spaces
* frequency of uncontrollable deadlines
* frequency of work interruptions
* exposure to adverse environmental conditions (e.g. extreme heat/cold, bad weather)
* exposure to health or accident hazards
* danger - accident from machinery, equipment

SUBFACTOR LEVELS (7)

1. What working conditions are present in this job? **(INDICATE ALL THAT ARE APPLICABLE)**

|  |  |
| --- | --- |
|  | (1) Generally pleasant working environment with little or no distractions or unpleasant elements. Work involves only common, everyday discomforts or unpleasantness. Occasional distraction from machines or noise. |
|  | (2) Conditions match most of the preceding level (1) and significant elements of the next level (3). |
|  | (3) a) *Some discomfort* due to exposure to dust, grease, ink, oil, noxious odours, noise, fumes or temperature variations, such as required exposure to weather. |
|  | (3) b) Work in *open area* that results in distraction and increased effort to concentrate. |
|  | Specify, and indicate the frequency (estimate percentage) of time worked in *open area*: |
|  |  |
|  | (3) c) Frequently deals directly with clients who shout or use abusive language. |
|  | (3) d) Multiple time demands due to performing work for 4 to 6 people. |
|  | Specify tasks and provide titles for whom the work is performed: |
|  |  |
|  | (3) e) Work with competing time demands and/or frequent interruptions uncontrollable by incumbent(s) (AT LEAST 25% of the time for either instance). |
|  | (3) f) Production quotas or highly repetitive (rote) work. |
|  | (4) Three or more of Level 3. |
|  | (5) a) *Considerable discomfort* due to more intense exposure to dust, grease, oil, extreme heat, cold, humidity, noise, obnoxious odours, or fumes or weather conditions. |
|  | Specify: |
|  |  |
|  | (5) b) Work with multiple time demands and/or constant interruptions uncontrollable by incumbent (greater than 50% of the time). |
|  | (5) c) Some exposure to human/animal waste or bodily fluid. |
|  | (6) Conditions match most of the preceding level (5) and significant elements of the next level (7). |
|  | (7) a) Predominant exposure to disagreeable surroundings which are more extreme than Level 5. Work requires a high degree of individual tolerance to combinations or *intensity* of extremely unpleasant elements. |
|  | (7) b) Work in places where severe soiling occurs despite protective clothing. |
|  | (7) c) Work with *intense* exposure to human or animal waste. |

Provide examples and explanation, as to why this level is required, in support of your selection(s).

## B. HAZARDS

This subfactor measures the risks inherent to the job over and above those found in ordinary life. The measurement is made according to the likelihood of hazard and not the actual occurrence of injury. Effective protective measures are expected to be taken.

Note: this subfactor does not apply to the use of stairs where there is the option to take an elevator; plugging and unplugging office equipment or straightforward installation of computer equipment.

The subfactors are characterized by:

* disagreeable surroundings
* out-of-town travel
* undesirable workplace conditions
* exposure to abusive, aggressive people
* exposure to adverse environmental conditions (e.g. extreme heat/cold, bad weather)
* exposure to health or accident hazards
* danger - accident from machinery, equipment

SUBFACTOR LEVELS (7)

1. What risks are *inherent* to the job? **(INDICATE ALL THAT ARE APPLICABLE)**

|  |  |
| --- | --- |
|  | (1) Work performed presents little or no potential for job-related accidental injury. |
|  | (2) Risks match most of the preceding level (1) and significant elements of the next level (3). |
|  | (3) a) Work involves some risks that are fairly predictable and controllable which require special procedures, safety precautions, and/or the use of special equipment, such as safety shoes, shields, ear protectors, gloves, protective clothing, etc. |
|  | (3) b) Minor injuries, such as abrasions, chemical or heat burns, bruises from falling on slippery floors, or injuries sustained while assisting in moving or lifting equipment or materials. |
|  | (3) c) Work around electrical equipment, moving machinery or hazardous or toxic substances (as specified in MSDS - Material Safety Data Sheets). |
|  | Specify: |
|  |  |
|  | (3) d) Work involves exposure to physically abusive or aggressive behaviour from the general public in a work location to which the public has *unrestricted, open access*. |
|  | (4) Risks match most of the preceding level (3) and significant elements of the next level (5). |
|  | (5) a) Work involves considerable risk which require special safety precautions and procedures and the regular use of special equipment. |
|  | (5) b) Exposure to *contagious disease* due to work with hazardous substances such as human/animal waste or bodily fluids. |
|  | (5) c) Injury is a possibility from repeated physical activity. |
|  | (6) Risks match most of the preceding level (5) and significant elements of the next level (7). |
|  | (7) High risks encountered on the job which are unpredictable and uncontrollable with the potential for either serious, disabling injuries, such as impairment to or permanent loss of major bodily functions, (e.g., sight, speech, hearing, use of limbs), or the loss of life. |

Provide examples and explanation, as to why this level is required, in support of your selection(s).

THANK YOU for taking the time to fill out the questionnaire.  
You will be contacted if we have any questions regarding your answers.  
PLEASE RETURN THE COMPLETED QUESTIONNAIRE TO:

DEPARTMENT OF HUMAN RESOURCES, JOB EVALUATION & COMPENSATION SERVICES, KINSMEN BUILDING.

REMINDER: Please sign the front page of the questionnaire.

# GLOSSARY

TO BE USED WITH YUSA/APUY JOB EVALUATION QUESTIONNAIRE ONLY. The brackets following the word refer to the factor(s) where the term is used.

*Administer a budget* (Assets, Information and Programs) - planning and forecasting; reconciling and resolving discrepancies; authority to move/transfer money from one budget line to another.

*Adversarial* (Communications-Nature) - contacts where there is a potential for conflict or opposing view; where information or a decision may not meet the interests/objectives of the person being informed.

*Adverse impact* (Consequence of Errors) - detrimental; causing damage or loss.

*Advise* (Communications-Purpose) - to provide a range of options and possible consequences in response to an inquiry. Involves probing to ensure that all relevant facts have been considered and includes explanation of relevant rules and regulations as applicable to the situation.

*Cognitive* (Complexity) - thought process that involves understanding/perception or application of knowledge.

*Competent performance* (Basic Knowledge) - the minimum requirements needed to perform the job on the first day. Some familiarization and training may still be required.

*Conceptual development* (Complexity) - forming from a concept/idea/theory into a more defined application, e.g., identifying a problem and creating processes to eliminate its reoccurrence.

*Considerable discomfort* (Context of Work -Environment) - Extensive distress or dissatisfaction.

*Contagious disease* (Context of Work - Hazards) - does NOT include exposure to colds, flu, etc. from co-workers or students.

*Counsel* (Communications-Purpose)- providing options and consequences to an individual while incorporating more personal circumstances into such advice. A counsellor may offer an opinion in discussing options based on a broader understanding of the individual's background.

*Facilitate* (Communications-Purpose; Assets, Information and Programs) - to communicate and gather information in order that others can complete tasks; ensure the flow of work functions.

*Fine finger movements* (Physical/Sensory Effort) - light, delicate precise movements.

*Ill-defined problem* (Complexity) - unclear, vague, or where parameters of the solution to the problem are not well-defined and require lengthy analysis.

*Important* (Consequence of Errors) – significant.

*Improvisation* (Complexity) - basic problem-solving using set procedures for which any modification would be based on the incumbent's knowledge of past practice in the area.

In-depth (Communications-Purpose) - explaining the background behind a rule or regulation; providing a context for same; explaining how a particular rule or regulation applies to a particular situation.

*Inferential reasoning* (Complexity) - linking points of fact (where information may be vague or disparate) in order to reach a conclusion.

*Informal information gathering* (Communications-Purpose) - accessing information that is readily available which is then provided to someone for decisions to be made.

*Inherent* (Environment-Hazards) - cannot separate the working condition from the job; these elements are not controllable by the incumbent.

*Integral and substantive* (Assets, Information and Programs) – essential.

*Intense* (Context of Work - Environment) - steady and/or overpowering.

*Intermittent* (Physical/Sensory Effort) - There are regular periods of concentrated attention or use of the senses.

*Interpreting information* (Communications-Nature) - to explain, make clear or re-state.

*Interpretive thinking* (Complexity) - that which is beyond established guidelines requiring creativity and analysis to clarify the issue(s).

*Interviewing* (Communications-Nature; Communications - Purpose) - asking probing questions to elicit clarification.

*Isolated problems* (Complexity) - a broader range of duties which may present situations which are outside of the day-to-day responsibilities.

*Light (Physical/ Sensory Effort)* - Easily done; not burdensome; moving weight between 3 to 5 kg.

*Major* (Assets, Information and Programs; Consequence of Errors) - primary or greater importance.

*Moderate* (Assets, Information and Programs; Consequence of Errors) - impact is not excessive and can be contained within reasonable limits (e.g. specific to unit or area).

*Monitor a budget* (Assets, Information and Programs) - checking monthly printouts and identify discrepancies; no responsibility to assign funds.

*Negotiate* (Communications-Purpose) - to confer with another party for the purposes of reaching an agreement by exchanging offers and alternatives.

*Open area* (Context of Work - Environment) - where there is no door which can be shut to have some privacy; shared space.

*Part-time* (Responsibility for Others) - employees who work on a continuing basis but work less than the full regular hours.

*Prolonged* (Physical/Sensory Effort)- extended period of time (greater than four hours uninterrupted) that requires continuous physical/sensory effort.

*Rapid* (Physical/Sensory Effort) - Moving swiftly.

*Recurring* (Physical/Sensory Effort; Responsibility for Others) - repeated at regular intervals

*Sensitive* (Communications-Nature; Assets, Information and Programs) - personal, financial, legal, or classified (research) information for which the incumbent has some responsibility to act upon such information.

*Sessional* (Responsibility for Others) - bargaining unit employees who work at least seven months but less than twelve months, with a recurring scheduled absence without pay during the balance of each calendar year.

*Some discomfort* (Context of Work - Environment) - lack of ease; creation of some distress and/or dissatisfaction.

*Sustained* (Physical/Sensory Effort) - frequent intense periods of concentrated effort; constant with limited opportunity for relief.

*Synthesize* (Complexity) - combine information from many sources to develop concepts or interpretations.

*Unrestricted open access* (Context of Work - Hazards) - a work area which allows for ease of entrance by students or the public (e.g., access unrestricted by counters, doors or dividers); where an employee may be vulnerable, due to their location, to aggressive behaviour.

*Unusual specific acuity* (Physical/Sensory Effort) - sharpness as in use of one or more of the five senses (seeing, hearing, touching, smelling, tasting).

*Work/Study student* (Responsibility for Others) - for example: a student who is part of a program with the Student Financial Services Office or similar set-up who normally works up to fifteen hours per week during the school year.