

**NSGEU**

**Job Evaluation Process**

# Agenda

- **Purpose of Job Evaluation Systems**
- **Job Evaluation Process at Dalhousie**
- **Completing the Job Fact Sheet (JFS)**
- **How to Submit a JFS**
- **Next steps**
- **Tools and Tips**
- **Questions?**

# Purpose of Job Evaluation Systems

- **Classification of jobs (not a performance evaluation)**
- **Determine internal value of job to the organization (relative to other jobs)**
- **Compensation system established separately (e.g., negotiated rates of pay)**

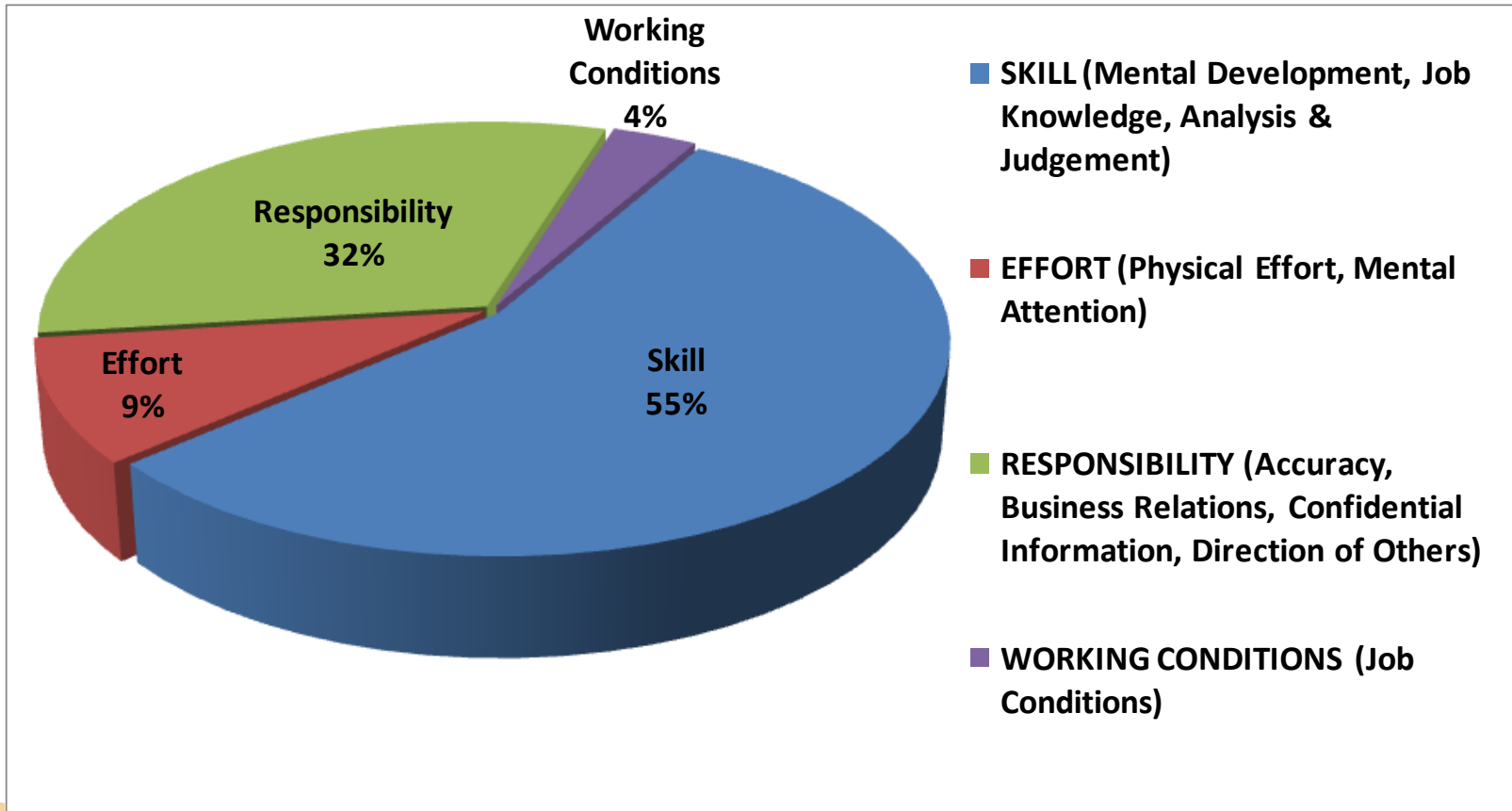
# Job Evaluation Process at Dalhousie

- **Point Factor Analysis (PFA) system**
- **Compensable factors weighted based on importance to the organization**
- **Skill, effort, responsibility, working conditions**
- **Each job scored on 10 factors**
- **Total score determines classification**

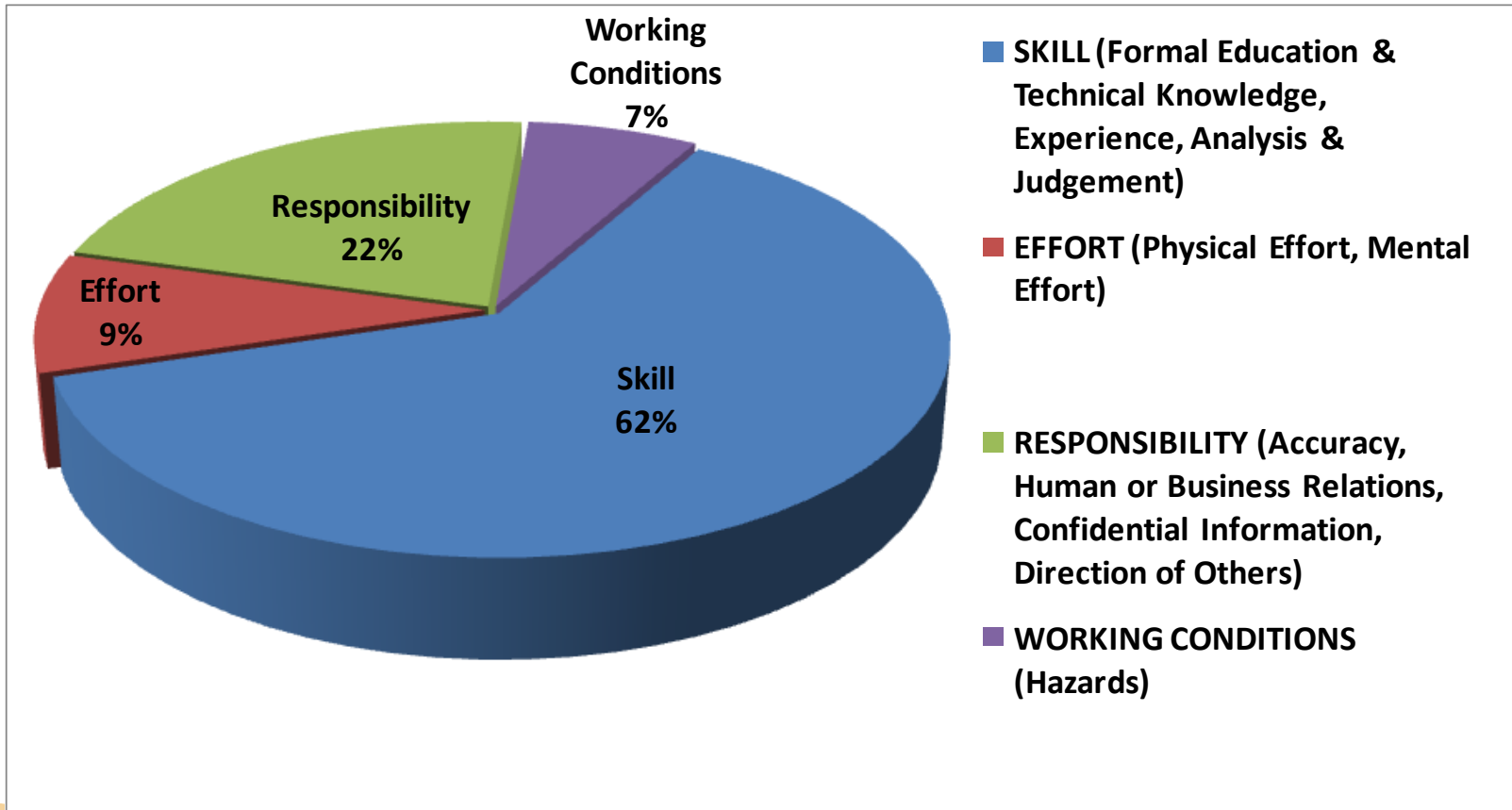
# Ten Compensable Factors for Dalhousie-NSGEU positions

	<u>Clerical</u>	<u>Technical</u>
<b>Skill</b>	Mental Development	Education
	Job Knowledge	Experience
	Analysis and Judgement	Analysis and Judgement
<b>Effort</b>	Physical Effort	Physical Effort
	Mental Attention	Mental Effort
<b>Responsibility</b>	Accuracy	Accuracy
	Business Relations	Human Relations
	Direction of Others	Direction of Others
	Confidential Information	Confidential Information
<b>Working Conditions</b>	Job Condition	Hazards

# Clerical Position Factor Weightings



# Technical Position Factor Weightings



# Job Evaluation – Other Processes

- **Conduct external research**
- **Participate in salary surveys**
- **Prepare job postings**
- **Pay for classifications determined through collective bargaining**



# Completing the Job Fact Sheet:

## 1. (A) PURPOSE OF POSITION

- **General statement describing broad purpose**
- **Why does job exist?**
- **Keep it brief (one or two paragraphs)**
- **Example:**

*To provide technical support to faculty, staff and student users of audio-visual equipment and services on the Studley campus, including servicing of equipment in classrooms, supporting loan pool and classroom computers, and conducting audio or video recording of lectures, interviews and other events.*

# Completing the Job Fact Sheet:

## 1. (B) WORK SITUATION

- Name and purpose of unit (academic / administrative)
- Size and scope (number of students, programs)
- Physical situation (office, lab, outdoors)
- Other employees (number, titles)
- Example:

*This position reports to the Director of Finance and is located in an open office setting. There are five other full-time employees (Administrator, Graduate Secretary, two Associate Deans, IT Technician) and six part-time employees. The faculty has eight departments, approximately 180 faculty and 3,500 students (graduate and undergraduate).*

# Completing the Job Fact Sheet:

## 2. MAJOR ACTIVITIES

- List 4 to 6 main responsibilities
- Estimate percentage of time spent on each
- List in order of importance and/or time allocation
- Use summary phrase, plus representative duties

# Completing the Job Fact Sheet:

## 2. MAJOR ACTIVITIES

### ● Example:

#### **Activity A: Administrative Support to Faculty (60%)**

*Type and proofread various materials (exams, correspondence, memos, etc.).  
Coordinate distribution and collection of course evaluations at end of each academic term.*

#### **Activity B: Secretarial Support to Director's Office (20%)**

*Answer telephone and respond to variety of inquiries; take and relay messages.*

#### **Activity C: Clerical Support for Billing (10%)**

*Prepare travel expense forms and cheque requisitions.*

#### **Activity D: Other (10%)**

*Maintain booking schedule for breakout rooms using Meeting Maker.*

# Completing the Job Fact Sheet:

## 3. EDUCATION AND SPECIFIC TRAINING

- **Minimum formal education or specific training (by today's standards)**
- **List equipment used or operated and associated time**
- **Not your personal qualifications**
- **Example:**
  - Completion of two year diploma in Information Technology with concentration in Systems Management/Networking.*
- **List required professional designations/certification**

# Completing the Job Fact Sheet:

## 4. RELEVANT EXPERIENCE

- Minimum experience required if job were to be posted
- Estimated on-the-job learning time for new employee (cyclical nature, technology specific to university, etc.)
- Your estimate, not your own acquired experience
- **Example:**

*Three to five years experience in systems administration, network configuration, and internet security.*

*Six months on-the-job training in SMART Board technology and Tandberg video conference equipment.*

# Completing the Job Fact Sheet:

## 5. INITIATIVE (INDEPENDENCE OF ACTION)...

- Types of decisions made and judgment used
- Focus on complexity and variety of situations
- Highlight judgment required when procedures or guidelines not present
- Outline depth of analysis taken to arrive at decisions
- **Example:**

*Determine priority of photocopy jobs to be produced and decide which jobs will be produced externally.*

OR

*Screen student appointment requests and refer to appropriate advisor.*

# Completing the Job Fact Sheet:

## 6. IMPACT OF ERRORS

- Describe most likely or most serious type of error
- Consequences (who, what), how it gets fixed
- Keep in mind there are usually checks and balances
- Not a reflection on performance
- Example:

*Incorrect prioritization of photocopy jobs may result in materials not being available for classes, exams, etc. and cause inconvenience to faculty and staff.*

OR

*Failure to screen appointment requests appropriately may result in incorrect match of student with advisor, or may unnecessarily increase advisor workload.*



# Completing the Job Fact Sheet:

## 7. WORKING WITH OTHERS (Contacts)

- Describe importance of contacts for your position (internal / external)
- List titles, frequency and method of contact
- Indicate nature of contact (e.g., give instruction, schedule meetings, place orders)
- Focus on the most important, most frequent contacts
- Example:

*Faculty – schedule meetings – daily – phone/in person*

*Suppliers – order equipment – monthly – phone/e-mail*

*U/g & graduate students – booking appointments – weekly – in person*

# Completing the Job Fact Sheet:

## 8. SUPERVISION OR DIRECTION EXERCISED

- Formal responsibility for supervision
- Explain how your role relates to each statement for which you checked a box
- List names of employees supervised, including weekly hours for students or part-time employees
- Example:

*5. Are you responsible for any portion of appraisal, discipline, hiring and replacement of personnel? Interview and hire part-time student for evening reception. Also assist Administrator with interviewing and hiring of Clerk C-4 as vacancy occurs.*

# Completing the Job Fact Sheet:

## 9. MENTAL AND VISUAL DEMANDS

- **Indicate most significant demands**
- **Consider frequency and duration**
- **List examples in point form if appropriate:**
  - Use computer screen for data entry for long periods (daily, 4 hours with breaks)*
  - Standing for long periods when delivering training (weekly, 3 hours)*
  - Answering high volume of phone calls at the front desk while responding to in person inquiries. (daily, 5 hours with breaks)*
- **What makes you most tired at the end of the day?**

# Completing the Job Fact Sheet:

## 10. WORKING CONDITIONS

- Point out items of personal risk or unusual discomfort (compared with other university jobs)
- Indicate frequency and length of exposure
- List materials handled or nature of worksite (e.g., formalin, anesthetic gases, construction site)
- Clerical/secretarial staff may describe as “typical office environment”

# Completing the Job Fact Sheet:

## 11. CONFIDENTIAL INFORMATION

- Explain why or how it is used (not simply access to)
- What is the opportunity for you to disclose, and what is the impact on others
- What is the nature of information and frequency of use
- Remember reliance on personal integrity
- Example:

*Collect and file course evaluations (3 times per year); type and print exams and midterms (8 times per year); prepare student payroll (bi-weekly); occasionally type confidential correspondence for Director.*

# Completing the Job Fact Sheet:

## 12. SPECIAL FEATURES

- Explain any items you feel are not covered by the other questions
- Outline what has changed in your job
- Example:

*Since the previous evaluation the regulations impacting my work have changed significantly, resulting in the requirement for a higher standard of training for my job as outlined in the Education and Specific Training section.*

OR

*The reorganization of our unit in 2008 has resulted in my position assuming responsibility to provide administrative and secretarial support for five additional faculty members, which necessitates the use of scientific terminology.*

# Completing the Job Fact Sheet:

## 13. SUPERVISOR'S COMMENTS

- Supervisors should add comments in this section to clarify information (not edit the body of the JFS)
- A copy of the comments should be provided to and discussed with employee
- In the event of discrepancy over information, the supervisor ultimately determines the assigned responsibilities of the job
- An organizational chart should be attached

# How to Submit the JFS

Your role (employee):

- E-mail completed JFS to [job.evaluation@dal.ca](mailto:job.evaluation@dal.ca)
- Print a copy, sign it, give to your supervisor



# What Happens Next?

**Our role (Human Resources /Job Evaluation):**

- **Follow-up face to face interviews (employee, supervisor), phone call or e-mail, if necessary**
- **Analysis and comparison with other positions in the university**
- **Factors scored ensuring consistency among similar positions is maintained**

# Getting the Results

- You and your supervisor will be notified in writing of the factor scores and the resulting classification
- Appeals must be initiated within 15 days of receiving the points letter
- Copy of detailed datasheet provided to NSGEU Officer Designated to Receive Substantiating Datasheets
- Appeals heard by the Job Evaluation Committee (2 University representatives, 2 NSGEU representatives, Chair, Job Analyst)
- No further recourse following appeal process

# Other Notes of Interest

- **Provisional vs. regular rating**
- **What happens if your job changes in between the 5 year review cycle?**

# Tools Available

- **NSGEU Collective Agreement (Article 26)**
- **Job Evaluation Manual and Explanation Guide**
- **Previous Job Fact Sheet or Job Description**
- **Consultation with Job Analysts**
  - Cathy Chiasson, 494-4742, [cathy.chiasson@dal.ca](mailto:cathy.chiasson@dal.ca)
  - Sundari Pashupathi, 494-7561, [sundari.pashupathi@dal.ca](mailto:sundari.pashupathi@dal.ca)
- **[humanresources.dal.ca](http://humanresources.dal.ca)**
- **Send email to : [job.evaluation@dal.ca](mailto:job.evaluation@dal.ca) or call 494-8886**

# Pointers and Tips

- **Read the Job Evaluation Manual and Explanation Guide**
- **Take your time; think about the questions**
- **Keep a diary or activity log over a period of time**
- **Use examples if helpful**
- **Seek input from colleagues, supervisors**
- **Use straight-forward terminology – keep it simple**
- **Don't wait until the last minute!**

# QUESTIONS?

