

Understanding Regarding Job Evaluation Project Activities (May 31 and June 1, 2018)

At the conclusion of Job Evaluation discussions on June 1, 2018, the Parties have reached agreement on all Appendices and Schedules attached to the LOU with the exception of Audit Process: Proposed Timeline (Schedule "B").

The Parties agree to defer this Schedule and anticipate it to be executed no later than July 31, 2018. The Parties agree that the general timeframe, as currently outlined in Schedule "B", will not be substantially altered with respect to the anticipated end date (March 2019).

The Parties agree that JCQ links will be distributed to managers on June 14, 2018.

Dated this 1st day of June, 2018

For the University:



Heather Shields

For the Union:



Kelly Orser

LETTER OF UNDERSTANDING: JOB EVALUATION

Having jointly developed and approved the sub-factors, levels, level descriptions and Job Content Questionnaire as key components of the new Job Evaluation System, the Parties agree that these elements and the related processes contained in Appendix "A" and Schedules "A" through "J" will not be unilaterally amended. The Parties further agree to the following:

1. Previous Letters of Understanding on Job Evaluation

- 1(a) The provisions of this *Letter of Understanding: Job Evaluation ("LOU")* replace the previous *Letter of Understanding (LOU): Job Evaluation* dated April 13, 2016. In addition, the provisions of this LOU are intended to supplement the provisions of the *Letter of Understanding: Activities of Working Group on Job Evaluation (WGJE)* dated April 13, 2016, unless the provisions of this LOU are in conflict, in which case, the provisions of this LOU will apply.
- 1(b) The joint Job Evaluation Committee (JEC, also referred to in the Chart of Activities as the JJEC), made up of equal representation from the University and USW Local 2010 is charged with making recommendations to the Parties with regard to all decisions involving the Job Evaluation Process. The Union members of the JEC are empowered to bind the Union to such decisions. Either Party may use the services of their own consultants or advisors. The JEC may delegate work as part of the Job Evaluation Process to the Working Group (WGJE) composed of members and/or non-members of the JEC.
- 1(c) The provisions of Article 8.03 will apply to Union representatives who attend joint meetings of either JEC or WGJE.
- 1(d) The University will designate a resource person to maintain the records and schedule meetings and bring in information as required by the Committee.
- 1(e) A Committee member from each Party shall be designated as Co-Chair person, and the two Co-Chairs shall chair the meetings alternately.
- 1(f) The provisions of this LOU replace the *Letter of Understanding: Position Re-Evaluation* dated April 13, 2016.

2. Scope of the Bargaining Unit

It is not the intention of the Parties that the provisions of *Article 2 - Recognition and Scope* of the Collective agreement be amended through the Job Evaluation Process.

If during the Job Evaluation Process the University determines that a position does not fall within the Bargaining Unit pursuant to Article 2, the University will notify the Union. If the Union

disagrees with the University's determination, the grievance procedure set out in Article 11 will apply.

3. Job Evaluation Committee (JEC) and Working Group on Job Evaluation (WGJE)

The work of the JEC and the Working Group Job Evaluation (WGJE) will continue until the new JE system is implemented.

4. Job Evaluation Process

The Job Evaluation Process is outlined in Appendix "A", which is attached.

5. Frequency of JEC/WGJE Meetings

The JEC/WGJE will meet as often as is required to operationalize the provisions of the Job Evaluation Process in accordance with the timelines outlined in the Job Evaluation Process (Appendix A). The JEC may agree to amend the timelines as outlined in the Job Evaluation Process (Appendix A) as needed.

6. USW Audit Process

The USW Audit Process and timelines are outlined in Appendix "A", as well as, Schedules "A" and "B" to Appendix "A".

7. Reference Data Set ("RDS")

The USW WGJE will advise the University no later than July 31, 2018 of the positions to be included in the RDS, which is to be used for the USW Audit Process.

Minor revisions to the list of positions in the RDS may be made subsequent to July 31, 2018.

8. Format of the Job Content Questionnaire (JCQ)

The format of the JCQ (Schedule "J") to be used for the Job Evaluation Process is the version contained in Qualtrics.

If the University identifies that changes to the current delivery method, instructions or technical platform for the JCQ are required, subsequent to the execution of this LOU, such changes will be subject to the agreement of the Union. No change(s) will be made to the sub-factor questions in the JCQ without mutual agreement.

9. Confidentiality of JE System Components

The factor and sub-factor weightings, levels and level descriptions are confidential and will not be shared with employees or managers by either Party. These components, in the possession of the Union (JEC/WGJE) for the purpose of the Job Evaluation Process are not to be used for any other purpose.

10. Post-Implementation Dispute Resolution

A separate process will be used for resolving disputes regarding the re-evaluation of any position post-implementation, per Schedule "C".

11. Adjustments to Compensation

All matters relating to compensation impacts from the transition to the new JE system will be discussed at Stage 6 of the Job Evaluation Process, or at such time as is agreed to by the Parties. Discussions will include considerations of retroactivity (including effective date and timing of payments, if any) and step composition in the salary grid. Where, as a result of the transition to the new JE System, an employee's salary would otherwise be reduced, there will be no reduction applied and their salary will remain unchanged until the maximum pay rate in the new pay grade exceeds the employee's salary ('red-circling'). The University will quantify and disclose to the Union the per-employee calculation of the compensation costs associated with all required red-circling and deduct these costs from the available budget to facilitate the transition to the new JE System.

12. Data Sharing and Transparency

During the Job Evaluation Process, the University and the Union will exchange data, including the Audit Materials, as required throughout, by uploading information into a shared QShare drive.

The Parties will continue to share communications regarding the Job Evaluation Project with each other in advance of distribution.

13. Transition to New Job Evaluation System

The Parties will negotiate and agree on the process for transitioning positions from the existing salary grid to the new salary grid as per Appendix "A".

The process for dealing with the evaluation of new bargaining unit positions, as well as the re-evaluation of existing positions during the period commencing with Stage 1 (JCQ Completion) of the Job Evaluation Process and ending no later than 60 calendar days following the anticipated implementation date for the new Job Evaluation System, is outlined in Schedule "D" which is attached to Appendix "A".

14. Pay Equity Maintenance

The Parties agree to use the new Job Evaluation System for the purposes of Pay Equity maintenance.

The Parties will meet 12 months after implementation of the JE system for the first Pay Equity Maintenance Meeting, and thereafter on an annual basis, unless the Parties agree to an alternate schedule.

The purpose of the Pay Equity Maintenance Meeting is to review the information necessary for the Parties to discharge their mutual obligations under the *Pay Equity Act*. In preparation for the meeting, the University will provide on a timely basis, information regarding the following:

- new positions introduced to the bargaining unit
- re-evaluations of existing bargaining unit positions
- any changes to the gender status of job classes across the bargaining unit and any subsequent impact to established male job class comparators

Dated this 1st day of June, 2018

For the University:



Heather Shields

For the Union:



Kelly Orser

Job Evaluation Process

HS
June 12, 2018

ALL dates are considered TENTATIVE, but the parties agree to make every effort to complete the work outlined within anticipated timelines.

Stage 1: JCQ Completion (June – September 2018)

1. Educate managers (include AODA requirements).
2. Educate employees.
3. JCQ links are e-mailed to managers.
4. JCQs are completed through both manager and employee involvement; multiple employees may contribute to a single JCQ. The JCQ is completed by the current incumbent(s) in the position.
5. An employee can access a PDF or Word version of the JCQ for use as a draft during the process of completing the JCQ contained in the email link. Final JCQs must be submitted through Qualtrics.
6. JCQs are to be completed based on the nature of the work being done in the role on the date the JCQ is signed off by the incumbent(s) and manager completing the JCQ, even in circumstances where the most recent iteration of the position summary is out-of-date.
7. If the manager and employee cannot agree on contents of JCQ, the dispute resolution process for Stage 1 described below is to be used.
8. Manager submits JCQ for screening to Human Resources (HR) by September 30, 2018.
9. HR screens JCQ and returns to manager and employee where clarification is necessary from the manager and/or employee.
10. Electronic link is sent by HR to manager and current incumbent(s) for sign-off of final JCQ (PDF).
11. Manager and employee submit the final signed off JCQ to HR.
12. A JCQ will not be evaluated by HR until it has been signed and dated by the current incumbent(s) in each position covered by the JCQ and their manager.

Dispute Resolution Mechanism for Stage 1

- *If a manager(s) and/or the current incumbent(s) in a position cannot agree on the JCQ content, the manager and/or the current incumbent will independently fill out a JCQ Dispute Resolution Form (Schedule "E") detailing the nature of the dispute including the sub-factor, the examples, specific question(s) and/or the rationale for their viewpoint on the issue in dispute.*
- *This JCQ Dispute Resolution Form will be sent to HR for review. HR will involve the manager(s), the incumbent(s) and the designated USW representative to resolve the outstanding dispute. The Parties may also engage their respective consultants at this stage if desired.*

Appendix "A"

- *Once agreement is reached, the manager and incumbents(s) will continue to the sign-off of the JCQ.*

Stage 2: Evaluation of Jobs in the Reference Data Set (RDS) by HR (July 2018 – November 2018)

1. HR Evaluators analyze JCQs and rate the job using the agreed-upon job evaluation system, which will include the rating level on each sub-factor and the associated rationale. The evaluators may request further clarification on the contents of the JCQ from incumbent(s) and managers as necessary. The evaluators will not change the contents of the JCQ document but will append notes flowing from the clarification(s).
2. HR Evaluators conduct score thumbing and consistency check.
3. HR Evaluators release a batch of job evaluations from the Reference Data Set to the Union for audit per agreed schedule. HR may flag for review/discuss with the Union anomalous results within the RDS.

Stage 3: Union Audit Process for Jobs in the Reference Data Set

(See supplemental documents: Reference Data Set (RDS), Audit Process Document (Schedule "A") and Audit Process - Proposed Timeline (Schedule "B") (August 2018 – November 2018)

1. Union reviews JCQ evaluation ratings with access to Audit Materials as defined in Schedule "A".
2. The Union completes either a Confirmation Form (CF) (Schedule "F") or a Request for Re-Assessment Form (RRF) (Schedule "G"), which is submitted to HR.
3. **If the Union completes an RRF, the dispute resolution process for Stages 2 and 3 described below is to be used.**

Stages 2 and 3 continue until all jobs in the RDS have been evaluated, audited and have a CF completed, which may occur at any point during the audit of the batch evaluations or as the result of dispute resolution.

Dispute Resolution Mechanism for Stages 2 and 3

Disputes between the University and the Union regarding the evaluation of positions in the RDS during Audit Process

- *The Union completes a RRF (Schedule "G"). HR will review. If there is still a disagreement in the ratings, HR and the Union will meet to discuss. If there continues to be disagreement, a consultant for each Party will be engaged and will make the final decision.*
- *The meeting between HR and the Union and the engagement of the consultants will be conducted to maximize efficiency and reduce costs (addressing multiple disputes where possible).*
- *Once the University and the Union are in agreement, or a decision has been rendered by the consultants, a CF (Schedule "F") will be completed.*

Appendix "A"

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JAO

Stage 4: Evaluation of remaining JCQs by HR (August 2018 – April 2019)

1. HR Evaluators analyze the remaining JCQs and rate each job using the agreed-upon job evaluation system.
2. JCQ and evaluation results will be available to the Union via QShare for ongoing review. Audit Materials will also be available on request.
3. At the request of the Union, the parties will meet to discuss any issues arising from their ongoing review of the remaining evaluations.

Stage 5: Appeal Process (May 2019 – September 2019)

1. Managers and current incumbents receive evaluation results, which will include the rating level on each sub-factor and the associated rationale, at the same time (target date early May 2019).
Managers and current incumbents will have 30 calendar days from the date of notification to indicate if they wish to dispute the results. If so, they will complete an Appeal Form (Schedule "H") detailing any additional information that they believe was omitted or insufficiently credited in the evaluation process, and an explanation about how this additional information might affect the rating. The completed Appeal Form must be signed by the employee and their manager and be submitted to HR by the deadline. The sign-off indicates both employee and manager have reviewed the Appeal Form, but does not necessarily indicate agreement with the content. If the manager does not sign-off on the Appeal Form within the timeline, the incumbent may submit the Appeal Form without the manager's signature provided the submission is completed within the timeline.
2. For disputes regarding multi-incumbent positions, an Appeal Form needs to be submitted by at least half of the current incumbents in order for the appeal to proceed.
3. If no Appeal Form is received within the time frame identified above, the evaluation will be considered final, unless an extension is granted. Extensions will only be granted on the basis of significant adversity.
4. HR will advise current incumbents, their managers and the Union of receipt of the Appeal Form.
5. HR will upload the Appeal Form to QShare and the Union will have 30 calendar days to review and inform HR which Appeals they consider likely to result in a change to one or more sub-factor levels. HR will advise the incumbent(s) and managers as to whether a given Appeal will be proceeding.
6. HR will review those Appeals that the Union has validated as per 5 above.
7. If HR and the Union agree on the ratings for the positions in dispute, the evaluations will be considered final.
8. If HR and the Union cannot agree on the ratings for the positions in dispute, then dispute resolution for Stage 5 will be invoked.

Appendix "A"

9. HR will communicate all decisions including all changes to sub-factor level ratings and/or rationales, if applicable, to the manager(s) and current incumbent(s) on completion of any required dispute resolution processes. The Union will be copied on such decisions.
10. Upon completion of the appeal process, evaluations will be deemed to be fully finalized.

Dispute Resolution Mechanism for Stage 5

HR and the union will meet to discuss the Appeals. If an agreement cannot be reached, an alternative dispute resolution mechanism will be implemented, to be defined prior to the first Appeal under Stage 5. The costs, if any, will be shared equally between the Parties.

Stage 6: Negotiation of Sub-factor Weighting and Development of Banding (Fall 2019)

1. The Parties will negotiate and agree on the definition of job classes, along with their respective gender dominance.
2. The Parties will negotiate and agree on the weights to be given to the individual sub-factors and levels.
3. The Parties will negotiate and agree on the point bands to be used to group job classes of comparable value.
4. The Parties will negotiate and agree on the male comparator for each of the bands.
5. The placement of positions within new bands will be negotiated between the Parties.

Once the bands have been agreed upon, the Parties will determine what, if any, pay equity adjustments to total compensation are owing and the method and schedule for payout. The anticipated implementation date for the new compensation system is January 1, 2020.

Processes for Employees on Leave:

The process document for employees on leave from positions that are included in the Job Evaluation Process is attached as Schedule "I".

Schedule "A"

HS
Dunlop

Reference Data Set (RDS) - Audit Process:

The following are the steps in the Union Audit Process:

Pre-Audit Process

1. HR Job Evaluation Project Team (JEPT) conducts evaluations of positions included in the RDS.

Audit Process:

2. JEPT uploads "Audit Materials" to QShare and notifies the Union by email of the upload. Materials will be uploaded in accordance with timelines outlined in the *Audit Process: Proposed Timeline* (Schedule B).

The Audit Materials include the following:

- List of positions from RDS included in upload;
 - Evaluation sub-factor level ratings and rationales;
 - Raters' notes for the listed positions including any additional information considered;
 - Job Content Questionnaire outputs (pdf) downloaded from Qualtrics by HR JEPT for the positions listed.
3. Audits are to be completed in accordance with the timelines outlined in the Audit Process: Proposed Timeline (Schedule B) and results in the uploading of one of the forms listed below to QShare:
 - **Confirmation Form (CF):** The CF documents the Union's confirmation that the evaluation results have been audited and that the Union is not disputing the results at the time of signing the CF.
 - **Request for Re-Assessment Form (RRF):** The RRF documents the Union's areas of disagreement, rationale and suggested changes to the evaluation of the audited position(s).

A CF or an RRF will be completed for each position in the RDS. However, the completed CF or RRF will apply to all positions associated with the evaluation that is audited. (This means that a single CF or RRF will apply to all positions covered by a single JCQ).

4. The JEPT will review RRFs uploaded by the Union and:
 - If the JEPT is in agreement with the RRF, they will complete a CF and upload to QShare, notifying the Union of the upload. The revised evaluation results will be documented and a final iteration of the results prepared and uploaded.

Schedule "A"

- If the JEPT does not agree with the RRF, the RRF will be scheduled for discussion at the next RRF meeting, as outlined in the Audit Process: Proposed Timeline (Schedule B).
5. If the Union and JEPT reach agreement on an RRF at the RRF meeting, a CF will be completed and the evaluation will be adjusted if required, and documented, in accordance with the outcome of the RRF meeting.
 6. If agreement is not reached at the RRF meeting, the Parties can agree to defer the resolution or refer the outstanding dispute to the respective consultants for discussion and final decision.
 7. The results of the consultants' decision will be captured in a CF and uploaded into QShare. The evaluation will be adjusted, if required, to reflect the decision of the consultants.

Schedule "C"

Process to address Re-evaluation and disputes post-implementation

HS
June 1, 2018
[Signature]

A. Process for submission of re-evaluation request

1. Positions, including newly-created positions, that have experienced significant change that is ongoing in nature qualify for re-evaluation. A re-evaluation pertains to a position, not to the incumbent in a position or work performance.
2. To qualify for re-evaluation:
 - a) the position must be currently filled
 - b) the position must have undergone significant changes that are ongoing in nature
 - c) the incumbent must have held the position for at least twelve months

Assignment of new duties that replace duties that are comparable or similar in nature to the former responsibilities of the position will not justify the initiation of a job re-evaluation dispute.

When a manager believes that a position under their supervision has experienced significant change, they will initiate the re-evaluation process.

Changes that may meet the criteria for position re-evaluation include:

- I. Organizational change that has an impact on one or more positions in the department, and results in ongoing, significant changes to affected positions
 - II. Ongoing, significant changes to the focus, function, scope, and/or responsibilities of a position requiring substantially different education, experience, skills, effort or the working conditions of the position.
- 3 (a) Where the significant change is validated, HR will conduct the re-evaluation, and notify the incumbent and the manager of any change to levels assigned in each sub-factor and any change in resulting salary grade placement. The effective date for pay adjustments resulting from upward grade level change will be the date indicated or agreed by the manager as the date that the changes became effective.
- 3 (b) If the re-evaluation proceeds as a result of the processes below, the retroactive date for salary adjustments will be the date on which the employee initiates the process set out in B (1) below.

B. Disagreement with respect to a Re-evaluation Proceeding

1. Where a manager determines that no significant change to a position has occurred, or fails, within a reasonable period of time (typically within 30 calendar days) to respond to the employee's claim that a significant change to their position has occurred, and the employee wishes to pursue the claim of significant change, the employee must first provide their manager with an opportunity to address the matter.

The employee must request a meeting with the manager within 15 business days after the employee becomes aware of the manager's determination. The manager will schedule the meeting as soon as possible, typically within 30 calendar days. The employee may be accompanied by a Union steward at

Schedule "C"

Process to address Re-evaluation and disputes post-implementation

such a meeting. It is the employee's responsibility to schedule the attendance of the Union steward, in consultation with the employee's manager.

2. If the disagreement is not resolved within 5 business days following the meeting, or any longer period as may be agreed by the Parties (the employee, manager, HR and the Union), then the employee will seek the Union's assistance in outlining in writing the nature of the changes that they consider significant and identify the following:

- The specific sub-factors that may have been impacted;
- The timing of the changes;
- Examples in support of the changes.

HR will schedule a meeting of the Parties within 10 business days of receipt of the submission. HR will provide its response to the dispute in writing to the employee and the Union within 10 business days of the meeting of the Parties. If there is agreement that significant change has occurred, the manager will initiate the re-evaluation process. Retroactivity of salary adjustment, if any, will be determined per A.3. (b) above.

3. If the matter is not resolved by the HR response, the Union may invoke an Alternative Dispute Resolution (ADR) mechanism. The ADR will consist of a written submission from the Union and the University. The Union's submission must include an outline of the nature of the significant change (reference bullets above in B.(2) above) and any other relevant information. The submissions will be sent to a mutually agreed third party* who will have access to the Factors and Sub-Factors document agreed by the Parties on June 21, 2016 in order to make a determination whether there is significant change. Terms of Reference will be developed by the Parties and provided to the third party. The outcome of the ADR would be either confirmation that no significant changes have occurred and the matter is resolved, OR a direction to proceed with the re-evaluation process set out in A (above). Dependent on the number of such cases, the Parties would commit to regular intervals for this activity, expected to be one or two times per year. The costs of ADR, if any, will be shared equally between the Parties.

C. Disagreement with Respect to Re-evaluation Rating Results

In circumstances where a re-evaluation is completed, the employee will receive a document outlining the levels assigned in each sub-factor and any change in resulting salary grade placement. If an employee disagrees with their sub-factor level outcome(s), the employee and the Union will outline in writing any information that they believe was omitted or insufficiently credited in the evaluation process, along with an explanation of how this additional information might affect the ratings.

HR will review the submission and determine whether any changes on the evaluation are warranted and provide a written response within 30 business days, or any longer period as may be agreed by the Parties. In the event the employee continues to disagree, the Union can forward the matter to the ADR mechanism for a decision on the merits of the submission, based on the Terms of Reference as noted in B above, within 10 business days after receiving the response from HR.

The outcome of the ADR resolution will be communicated to the Union and HR and will include notifying the incumbent and the manager of any change to levels assigned in each sub-factor. Retroactivity of salary adjustment, if any, will be determined per A.3. (b) above.

Schedule "C"

Process to address Re-evaluation and disputes post-implementation

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[Signature]

* The Parties are committed to the use of a single mutually agreed third party to resolve these disputes. In the event that the Parties cannot reach agreement on a single third party, they may elect to each use an independent consultant who will be expected to work together to reach a resolution.

Schedule "D"

HS
June 1, 2018
[Signature]

Evaluation and re-evaluation processes post JCQ launch

JCQ to be completed based on current work

- All JCQs should be completed based on the nature of the work currently being done in the role, even if that is not entirely consistent with the most recent iteration of the position summary.

If during completion of the JCQ, the manager notes that a position summary requires significant updating, then the current re-evaluation process should be followed in addition to finalizing and submitting the JCQ.

Until the commencement of the Transition Period (see below), managers will continue to submit evaluation and re-evaluation requests under the current process.

Any applicable retroactivity on salaries will adhere to the current process, in which salary adjustment or red-circling is applicable retroactive to the date indicated by the manager on the Position Re-evaluation Form (HR-FRM-039).

Where a significant change occurs (re-evaluation) in a position following the date on which the JCQ for that role was signed off by the manager and incumbents(s), and prior to the Transition period (defined see below), a new JCQ may need to be completed. A list of all re-evaluations done during this period (approximately 16 months) will be maintained and shared with USW. Analysis of these cases will be completed by the evaluators during the first 90 days following implementation of the new job evaluation system. This analysis would involve an assessment of changes made to the position summary pre-and-post re-evaluation and a comparison against the JCQ data submitted for the role. Where that analysis reflects changes that might impact the level of one or more sub-factors, a new JCQ would be completed and evaluated.

Disputes in this context would be subject to the Process to address Re-evaluation and disputes post-implementation (Schedule C).

- New Positions created following deadline for submission of JCQs

In addition to following the current practice for evaluation of new positions, where an entirely new position is created following deadline for submission of JCQs and up to and including 30 calendar days prior to the evaluation results being issued pursuant to the Job Evaluation Process (Appendix "A"), a JCQ will be completed by the employee and their manager. Incumbents in new bargaining unit positions will be given a reasonable familiarization period, if needed, prior to completing the JCQ. This is necessary to enable that incumbent to participate in the review of evaluation results and the subsequent

Schedule "D"

Appeal Process. Any individual hired into a new bargaining unit position 29 days or fewer prior to the evaluation results being issued will not participate in the Appeal Process.

"New Position" means a position that the Employer determines is entirely distinct from anything currently in the bargaining unit. It is anticipated that very few New Positions will be created during this time period.

- Commencement of the Transition Period

The Transition Period commences approximately 60 calendar days prior to anticipated date of implementation of the new Job Evaluation System and ends no later than 60 calendar days following the implementation of the new job evaluation system.

Any re-evaluations submitted (in the queue) on or before the Transition Period commences will be processed under the current system.

No re-evaluations will be accepted under the current system during the Transition Period.

Any substantive changes that occur to an existing position during the Transition Period will be processed under the new system following the end of the Transition Period. Salary adjustments, if any, associated with changes during this period would be retroactive to a period no earlier than the implementation date for the new system.

New positions created during the Transition Period and prior to implementation of the new system will be evaluated under the current system and reviewed under the new system following implementation.

Requests to review position(s) that have substantially changed subsequent to the beginning of the Transition Period can be submitted under the new JE system beginning 61 calendar days following the implementation date for the new system, and any disputes will be addressed using the Process to address Re-evaluation and disputes post-implementation (Schedule C).

H/A
June 1, 2018 KDD**JCQ Dispute Resolution Form**

Completed by (please print full name):

JCQ Information

JCQ #:

Position Number:

Position Incumbent:

Position Manager:

In your view, why are you unable to agree on the contents of the JCQ?

Please refer to the specific sections and questions in dispute and describe the nature of the dispute, the rationale for your view point on the issue in dispute, and examples, as necessary.

Signature of employee or manager completing form: _____

(print name)

Date: _____

This image shows a completely blank white rectangular area enclosed within a thin black frame. There are no markings, text, or illustrations present on the page.

H/A
June 1, 2015 [Signature]**Confirmation Form****JCQ Information**

JCQ #:

Position number(s) and incumbent name(s):

☐ **The evaluation of the above-noted JCQ has been audited by the Union and the Union confirms that it is not disputing the results at this time.**

Name: _____ Signature: _____ Date: _____ (USW)

☐ **Post RRF – No changes to evaluation results**

Name: _____ Signature: _____ Date: _____ (USW)

Name: _____ Signature: _____ Date: _____ (QU)

☐ **Post RRF – Revised (evaluation results attached)**

Name: _____ Signature: _____ Date: _____ (USW)

Name: _____ Signature: _____ Date: _____ (QU)

HA
June 1, 2018
HO

Request for Reassessment FORM (to be completed by USW)

JCQ Information

JCQ #:

Position number(s) and incumbent name(s):

Description of Dispute

Sub-Factor	Current Rating	Proposed Rating	Rationale (USW)

Comments

Schedule "G"

Signature of USW Representative: _____

(print name)

Date: _____

Schedule "H"

HJ
June 12, 2015

USW Local 2010 Job Evaluation Results Appeal Form

JCQ #: _____

Position #: _____

Incumbent name: _____

Manager name: _____

Please provide details of any **additional** information that you believe was omitted or insufficiently credited in the evaluation process and an explanation of how this **additional** information might affect the rating of the sub-factor(s).

Sub-Factor: Education	Original Rating :
Additional Information to Consider:	
Sub-Factor: Experience	Original Rating :
Additional Information to Consider:	
Sub-Factor: Interpersonal and Communications Skills	Original Rating :
Additional Information to Consider:	
Sub-Factor: Problem Solving and Complexity	Original Rating :
Additional Information to Consider:	
Sub-Factor: Supervision and Functional Guidance	Original Rating :
Additional Information to Consider:	
Sub-Factor: Planning and Coordination	Original Rating :
Additional Information to Consider:	
Sub-Factor: Impact of Decisions	Original Rating :
Additional Information to Consider:	
Sub-Factor: Physical Effort	Original Rating :
Additional Information to Consider:	
Sub-Factor: Concentration	Original Rating :
Additional Information to Consider:	

Schedule "H"

Sub-Factor: Physical Environment/Health and Safety Risks	Original Rating :
Additional Information to Consider:	
Sub-Factor: Job Pressure	Original Rating :
Additional Information to Consider:	
Additional Incumbent Comments:	
Additional Manager Comments:	
Employee Signature:	
Manager Signature:	

Please note: In order for an Appeal to proceed for a position with multiple incumbents, an individual Appeal Form must be submitted independently by at least half of the current incumbents.

Schedule "I"

June 1, 2018 HH
140

USW JE Project: Job Information Gathering stage (JCQs) - Treatment of Positions with Employees on Leave

Employees on Leave

JCQs will be distributed to the current incumbent only in a USW bargaining unit position.

Evaluation results for the Job Evaluation Process are distributed to the current incumbent only for review as part of the Appeal process.

Employees on leave, for any reason, from a position covered by a JCQ will not participate in the Job Evaluation Process while on leave from the position.

Scenario:

- Employee #1 the incumbent in the position completes the JCQ, but goes on leave prior to evaluation results being issued.
- Employee #2, incumbent in position when evaluation results issued. Employee #2 will receive the results and can participate in Appeal process, but not Employee #1.

In circumstances where a position is not backfilled during an employee's leave

If the employee returns from the leave up to and including 30 calendar days prior to the evaluation results being issued pursuant to the Job Evaluation Process, the employee may review an existing completed JCQ or complete a new JCQ. This is necessary to enable that employee to participate in the review of evaluation results and the subsequent Appeal Process.

Any employee returning from leave 29 days or fewer prior to the evaluation results being issued or at any later date will not participate in the Appeal Process. The employee will have an opportunity to review an existing completed JCQ or complete a new one, if appropriate.

Any disputes in this context by the employee, relating to either JCQ content or the evaluation results, would be subject to the Process to address Re-evaluation disputes post implementation (Schedule "C").

Employees on a Short-Term Work Break

- If the incumbent returns from short-term work break up to and including 30 calendar days prior to the evaluation results being issued pursuant to the Job Evaluation Process, a JCQ will be completed by incumbent and manager. This is necessary to enable that incumbent to participate in the review of evaluation results and the subsequent Appeal Process.

Schedule "I"

- Any individual returning from a short term work break 29 days or fewer prior to the evaluation results being issued will not participate in the Appeal Process, but will have an opportunity to review the JCQ completed by their manager and by other incumbents in the case of a multi-incumbent positions.

Any disputes in this context by the employee on the short term work break, relating to either JCQ content or the evaluation results would be subject to the Process to address Re-evaluation disputes post implementation (Schedule "C").

June 1, 2018
HJ

Schedule J: Job Content Questionnaire as programmed in Qualtrics

Instructions

Job Content Questionnaire (JCQ) Instructions

Read the questions carefully. Be brief, but include enough detail to provide a fulsome and clear picture of the role. Spell out acronyms and/or provide definitions for any unit/function-specific terms.

The position summary (also known as a job description) for the job will be helpful to have available, since there are sections of the JCQ where content may be copied from the position summary.

You can navigate between the questions and sections by clicking the "Back" and "Next" buttons at the bottom of each page. Do not use the browser's back button; it will take you out of the JCQ.

The JCQ has branching logic built in; therefore, some questions will only be shown depending on answers to prior questions in that section (e.g. If you select no, the linked questions that directly follow will not be shown or need to be completed).

The JCQ allows for completion in multiple sessions. The answers you enter will be automatically saved once you click the "Next" button at the bottom of each page. You can leave the JCQ unfinished at any point by closing your browser by clicking on the X at the top right of your screen. You can continue filling out the JCQ at another time by clicking on the link that was sent to you. You will be returned to the page that you last completed.

There will be opportunity for review and a final warning message at the end of the JCQ. Once you press "Next" on the last page, you will not be able to return to the JCQ.

Once your submitted JCQ is reviewed by HR, you will receive an email for the next steps/sign-off process.

For further information see the website [Queen's & USW Job Evaluation System Project](#).

If you have further questions or require assistance, submit a [Support Request](#).

Cover Page

Job Content Questionnaire Identification Information

Job Content Questionnaire Number:

+18
200

Job Group Identification Number:

Faculty/Area:

Job Title:

Position Number:

Employee Name:

Manager's Name:

Manager's Job Title:

Please verify the accuracy of the above information. Please indicate any corrections below.

Note: If this job content questionnaire applies to more than one position, you will be prompted in the next questions to provide all applicable position numbers, position titles and employee names.

Additional Positions Represented by JCQ

The following questions collect information on the additional positions for which this Job Content Questionnaire (JCQ) represents. The manager will complete this section.

Are there other positions/employees for whom this JCQ applies?

- ☐ Yes
☐ No

How many additional positions/employees does this JCQ represent?

Is the manager the same for all other positions/employees whom this JCQ applies?

- ☐ Yes
☐ No

1. Additional Position

1. Employee Name**1. Employee Position Number****1. Employee Position Title****1. Manager's Name****2. Additional Position****2. Employee Name****2. Employee Position Number****2. Employee Position Title****2. Manager's Name****3. Additional Position****3. Employee Name****3. Employee Position Number****3. Employee Position Title****3. Manager's Name**

11/1
1/10**4. Additional Position**

4. Employee Name

4. Employee Position Number

4. Employee Position Title

4. Manager's Name

5. Additional Position

5. Employee Name

5. Employee Position Number

5. Employee Position Title

5. Manager's Name

6. Additional Position

6. Employee Name

6. Employee Position Number

6. Employee Position Title

6. Manager's Name

7. Additional Position

7. Employee Name

7. Employee Position Number

7. Employee Position Title

7. Manager's Name

8. Additional Position

8. Employee Name

8. Employee Position Number

8. Employee Position Title

8. Manager's Name

9. Additional Position

9. Employee Name

9. Employee Position Number

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9. Employee Position Title

9. Manager's Name

10. Additional Position

10. Employee Name

10. Employee Position Number

10. Employee Position Title

10. Manager's Name

11. Additional Position

11. Employee Name

11. Employee Position Number

11. Employee Position Title

11. Manager's Name

12. Additional Position

12. Employee Name

12. Employee Position Number

12. Employee Position Title

12. Manager's Name

13. Additional Position

13. Employee Name

13. Employee Position Number

13. Employee Position Title

13. Manager's Name

14. Additional Position

14. Employee Name

14. Employee Position Number

14. Employee Position Title

14. Manager's Name

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15. Additional Position

15. Employee Name

15. Employee Position Number

15. Employee Position Title

15. Manager's Name

Section 1 - Key Responsibilities

Section 1 of 14: Key Responsibilities

Please enter up to 8 key responsibilities for the job in the numbered spaces below. These should be the most significant responsibilities in the job, listed with the most significant at number 1 and the least significant at number 8.

"Most significant" means responsibilities that:

- Are needed to perform the job properly
- Are relied upon by others

ENTER UP TO 8 KEY RESPONSIBILITIES:

1

2

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3

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This is the end of Section 1 of 14: Key Responsibilities. The answers that you have entered will be automatically saved once you hit the next button at the end of each page. At any point in the questionnaire you can leave it by closing your browser by clicking on the X at the top right of your screen. You can continue filling out the questionnaire another time by clicking on the link that was sent to you in the email.

Section 2 - Education

Section 2 of 14: Education

The following questions refer to the minimum education required for someone to be hired into the job.

Select the minimum level of education required to perform the essential job duties.

This should reflect the requirement of the job, not the personal education level of the current incumbent, which may be more or less than what is required.

- ☐ Secondary school diploma
- ☐ Some post-secondary education, up to and including one year
- ☐ Two-year community college diploma
- ☐ Three-year community college diploma
- ☐ Three-year Bachelor degree
- ☐ Four-year Bachelor degree
- ☐ Master's degree or equivalent specialized graduate studies
- ☐ Ph.D or equivalent

Is a specific course, program or area of specialization required?
(for example: business administration, nursing, etc.)

Yes

☐

No

☐

Specify course, program or area of specialization.

Does this job require a professional designation, certification or license?

Yes

☐

No

☐

What is the designation, certification or license?

How many hours of study or internship are required to attain the designation, certification or license?

Is there a requirement in this job to undertake ongoing learning?

Ongoing learning may be required to:

- Update skills
- Increase knowledge
- Learn new work methods, trends in field and/or concepts

Yes

☐

No

☐

Please provide further details about the requirement for ongoing learning. Be sure to include examples of skills that regularly need updating and work methods, concepts and/or technologies that are regularly changing.

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This is the end of Section 2 of 14: Education. The answers that you have entered will be automatically saved once you hit the next button at the end of each page. At any point in the questionnaire you can leave it by closing your browser by clicking on the X at the top right of your screen. You can continue filling out the questionnaire another time by clicking on the link that was sent to you in the email.

Section 3 - Experience

Section 3 of 14: Experience

The following questions refer to the minimum amount of experience needed for someone to be hired into the job, assuming that the person would have the required education level.

The questions are divided into two periods of time:

- What would it take to get the job?
- What would it take for a person to get up to speed with the requirements after starting in the job?

Select the minimum amount of directly related job experience a person would need to start in the job.

This should reflect the requirements of the job, not the personal experience of the current incumbent, which may be more or less than what is required.

- ☐ Up to and including 3 months
- ☐ More than 3 months and up to and including 6 months
- ☐ More than 6 months and up to and including 1 year
- ☐ More than 1 year and up to and including 2 years
- ☐ More than 2 years and up to and including 3 years
- ☐ More than 3 years and up to and including 4 years
- ☐ More than 4 years and up to and including 5 years
- ☐ More than 5 years

Explain why the experience is necessary and provide any details that are relevant about the type of experience required.

Assuming that a person has the minimum pre-job experience specified, what is the minimum on-the-job training and/or learning period a person new to the job would need before being able to perform all the tasks and ensure the smooth flow of work?

Select from the list below:

- ☐ Up to and including 3 months
- ☐ More than 3 months and up to and including 6 months
- ☐ More than 6 months and up to and including 1 year
- ☐ More than 1 year

Please provide further details about the learning period. Be sure to explain the rationale for more than 1 year of on-the-job training.

This is the end of Section 3 of 14: Experience. The answers that you have entered will be automatically saved once you hit the next button at the end of each page. At any point in the questionnaire you can leave it by closing your browser by clicking on the X at the top right of your screen. You can continue filling out the questionnaire another time by clicking on the link that was sent to you in the email.

Section 4 - Interpersonal and Communication Skills

Section 4 of 14: Interpersonal and Communication Skills

The following questions identify the requirement in the job to interact and communicate with regular contacts, both within and outside of the University.

The following is a list of possible contacts for Queen's University employees. It is provided as an aid to help you to think of all the people with whom the job interacts regularly. Please choose all those with

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whom the job is regularly required to interact.

- | | |
|---|--|
| <input type="checkbox"/> co-workers | <input type="checkbox"/> government officials |
| <input type="checkbox"/> faculty | <input type="checkbox"/> individual donors |
| <input type="checkbox"/> students | <input type="checkbox"/> medical professionals |
| <input type="checkbox"/> internal clients | <input type="checkbox"/> legal counsel |
| <input type="checkbox"/> external clients | <input type="checkbox"/> media |
| <input type="checkbox"/> heads of other departments | <input type="checkbox"/> professional colleagues |
| <input type="checkbox"/> general public, including patients | <input type="checkbox"/> prospective employers |
| <input type="checkbox"/> external suppliers/contractors | <input type="checkbox"/> representatives of professional organizations |
| <input type="checkbox"/> volunteers | <input type="checkbox"/> residents of student housing |
| <input type="checkbox"/> funding organizations | <input type="checkbox"/> Other, please specify: |
| | <input type="text"/> |
| <input type="checkbox"/> retirees | <input type="checkbox"/> Other, please specify: |
| | <input type="text"/> |
| <input type="checkbox"/> alumni | <input type="checkbox"/> Other, please specify: |
| | <input type="text"/> |
| <input type="checkbox"/> auditors | <input type="checkbox"/> Other, please specify: |
| | <input type="text"/> |

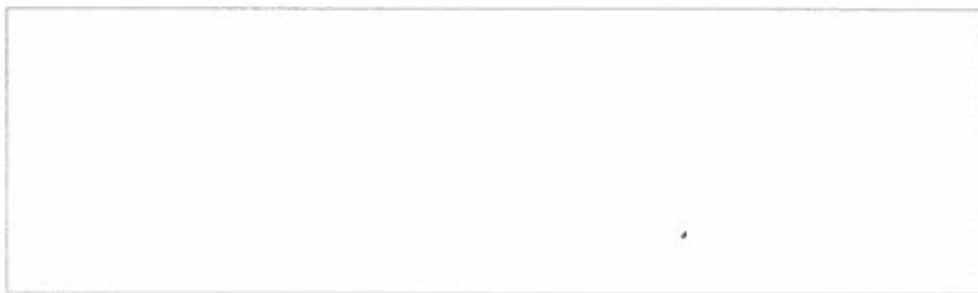
Consider the types of interactions below that are encountered in many jobs. Keeping in mind the contacts identified in the previous question, select the 5 interactions required on a recurring basis, that are most challenging or require the highest level of specialized interpersonal skill.

- ☐ Common courtesy and effective listening
- ☐ Working cooperatively with others
- ☐ Giving or asking for basic information
- ☐ Communicating technical, scientific or administrative information
- ☐ Expressing support or compassion
- ☐ Explaining technical matters in non-technical terms
- ☐ Delivering detailed oral and/or written information
- ☐ Exchanging straightforward oral and/or written information
- ☐ Exercising discretion or diplomacy
- ☐ Explaining ideas related to complex or controversial issues
- ☐ Acting as resource person through interaction with staff, students, public, patients or clients
- ☐ Providing recommendations/advice for action
- ☐ Advising students (e.g. regarding academic progression, awards, regulations and/or policies, etc.)
- ☐ Persuading others to adopt or change their actions
- ☐ Probing for information
- ☐ Relaying information that may not be well-received
- ☐ Resolving complaints or challenging interpersonal situations
- ☐ Developing instructional materials for specific users
- ☐ Developing and cultivating rapport to build and foster trust, credibility and/or strategic relationships
- ☐ Providing personal or therapeutic counselling

You indicated that common courtesy and effective listening occur within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.

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You indicated that working cooperatively with others occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.

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You indicated that giving or asking for basic information occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.

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You indicated that communicating technical, scientific or administrative information occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.

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You indicated that expressing support or compassion occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.

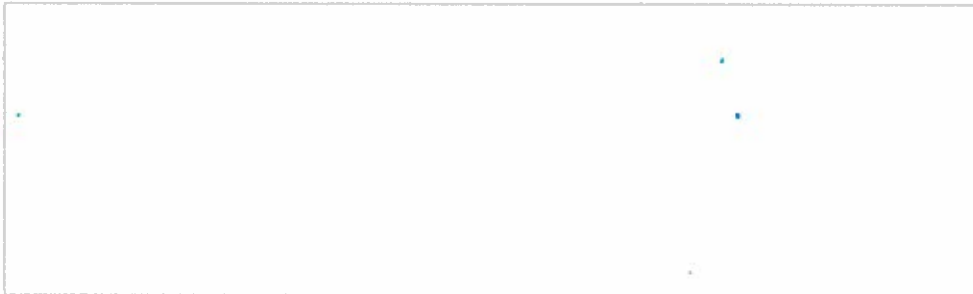
You indicated that explaining technical matters in non-technical terms occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.

You indicated that delivering detailed oral and/or written information occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.

You indicated that exchanging straightforward oral and/or written information occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.



You indicated that exercising discretion or diplomacy occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.



You indicated that explaining ideas related to complex or controversial issues occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.



You indicated that acting as resource person through interaction with staff, students, public, patients or clients occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.

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You indicated that providing recommendations/advice for action occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.

You indicated that advising students (e.g. regarding academic progression, awards, regulations and/or policies, etc.) occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.

You indicated that persuading others to adopt or change their actions occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.

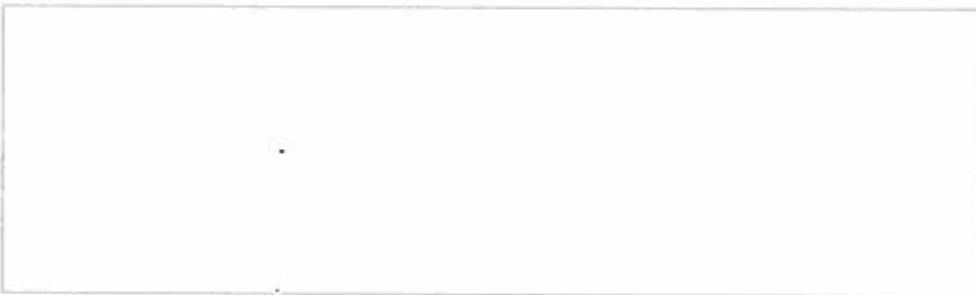
You indicated that probing for information occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.



You indicated that relaying information that may not be well-received occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.



You indicated that resolving complaints or challenging interpersonal situations occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.



You indicated that developing instructional materials for specific users occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.



You indicated that developing and cultivating rapport to build and foster trust, credibility and/or strategic relationships occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.



You indicated that providing personal or therapeutic counselling occurs within this job. Please provide an example of an interaction that illustrates the challenge or specialized interpersonal skill needed.



This is the end of Section 4 of 14: Interpersonal and Communication Skills. The answers that you have entered will be automatically saved once you hit the next button at the end of each page. At any point in the questionnaire you can leave it by closing your browser by clicking on the X at the top right of your screen. You can continue filling out the questionnaire another time by clicking on the link that was sent to you in the email.

Section 5 - Problem Solving and Complexity

Section 5 of 14: Problem Solving and Complexity

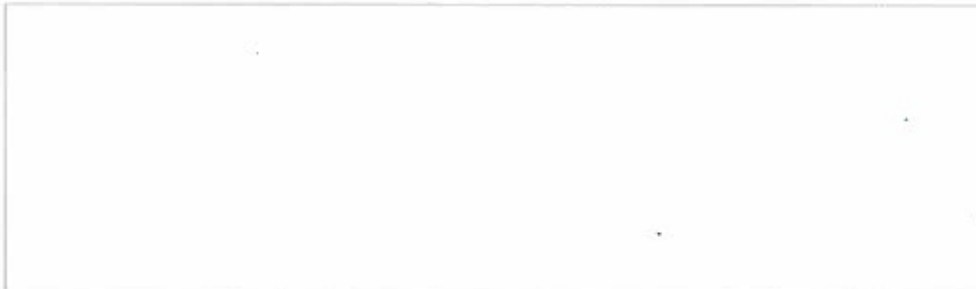
The following questions identify the requirement in the job to understand, collect, interpret and analyze information to identify and solve problems and take action.

Most jobs require a range of skills to identify and solve problems. Consider the tasks below that are found in many jobs. Select 3-5 tasks that show the most challenging, specialized or complex nature of situations faced in this job.

- ☐ Applying known solutions to straightforward problems
- ☐ Identifying the source of problems
- ☐ Developing innovative or creative solutions to problems where past precedent did not provide a solution
- ☐ Searching for or gathering relevant information

- ☐ Evaluating complex information
- ☐ Performing routine tasks using a checklist
- ☐ Keeping records (input data into existing format) and/or identifying missing or mismatched data
- ☐ Analyzing or interpreting meaning of documents
- ☐ Using math (standard operations, formulae and/or equations, statistics)
- ☐ Using technical symbols or terms (legal/medical/scientific, etc)
- ☐ Performing equipment maintenance
- ☐ Troubleshooting and/or repairing equipment malfunction
- ☐ Applying standardized technical/scientific/medical procedures or protocols with some modification
- ☐ Executing complex, multi-step procedures or protocols to produce complex equipment/materials
- ☐ Using existing templates to produce correspondence or complete forms
- ☐ Composing content for formal documents or websites
- ☐ Composing, editing or adapting content of written or graphic materials (requiring knowledge of subject matter)
- ☐ Generating financial reports
- ☐ Assessing techniques carried out by others

You indicated that applying known solutions to straightforward problems occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.



You indicated that Identifying the source of problems occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.



You indicated that developing innovative or creative solutions to problems where past precedent did not provide a solution occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.

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You indicated that searching for or gathering relevant information occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.

You indicated that evaluating complex information occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.

You indicated that performing routine tasks using a checklist occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.

You indicated that keeping records (input data into existing format) and/or identifying missing or mismatched data occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.



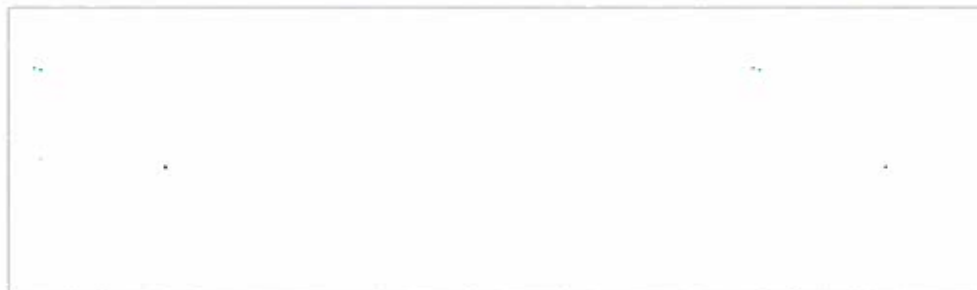
You indicated that analyzing or interpreting meaning of documents occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.



You indicated that using math (standard operations, formulae and/or equations, statistics) occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.



You indicated that using technical symbols or terms (legal/medical/scientific, etc.) occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.



You indicated that performing equipment maintenance occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.

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You indicated that troubleshooting and/or repairing equipment malfunction occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.

You indicated that applying standardized technical/scientific/medical procedures or protocols with some modification occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.

You indicated that executing complex, multi-step procedures or protocols to produce complex equipment/materials occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.

You indicated that using existing templates to produce correspondence or complete forms occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.



You indicated that composing content for formal documents or websites occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.



You indicated that composing, editing or adapting content of written or graphic materials (requiring knowledge of subject-matter) occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.



You indicated that generating financial reports occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.



You indicated that assessing techniques carried out by others occurs in this job. Please provide an example that illustrates the challenge, specialization and/or complexity involved.

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This is the end of Section 5 of 14: Problem Solving and Complexity. The answers that you have entered will be automatically saved once you hit the next button at the end of each page. At any point in the questionnaire you can leave it by closing your browser by clicking on the X at the top right of your screen. You can continue filling out the questionnaire another time by clicking on the link that was sent to you in the email.

Section 6 - Supervision and Functional Guidance

Section 6 of 14: Supervision and Functional Guidance

The following questions gather information on the responsibility for the coordination, direction and/or supervision of continuing/term employees, casual staff, work study students, volunteers and/or external suppliers/contractors.

Does this role have ongoing responsibility for supervising others?

Ongoing responsibility means supervising at least one individual at any one time (continuing/term employees, casual staff, work study students, volunteers, external supplier/contractors).

Note: work study students includes Summer Work Experience Program (SWEP), work study/bursary and student contracts (Teaching Assistant (TA)/Research Assistant (RA)).

Supervising is defined as:

- scheduling and assigning work
- monitoring and assessing the quality of work
- providing input on work performance to management staff and identifying development and training opportunities
- providing coaching, participating in screening/interviewing job candidates and providing input into staff selection as appropriate

Yes

☐

No

☐

Please indicate the type(s) of individuals supervised

- ☐ Continuing/term employees
- ☐ Casual Staff
- ☐ Work study students (includes Summer Work Experience Program, bursary and student contracts)
- ☐ Volunteers
- ☐ External suppliers/contractors

Please indicate the highest number of continuing/term employees regularly supervised.

Please indicate the highest number of casual staff regularly supervised.

Please indicate the highest number of work study students (includes Summer Work Experience Program, bursary and student contracts) regularly supervised.

Please indicate the highest number of volunteers regularly supervised.

Please indicate the highest number of external suppliers/contractors regularly supervised.

Which of the following supervisory activities does this role have responsibility for with respect to Continuing/Term employees?

SELECT ANY THAT APPLY:

- ☐ Scheduling and assigning work
- ☐ Monitoring and assessing quality of work
- ☐ Providing coaching
- ☐ Participating in screening and interviewing job candidates
- ☐ Providing input on work performance to management
- ☐ Identifying development and training opportunities

Does this role have ongoing responsibility as a team lead for other continuing/term employees?

Team lead responsibility is defined as:

- scheduling and assigning work
- monitoring and ensuring the completion of tasks

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Yes

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No

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Please provide details about the team lead responsibility (i.e. for which positions does this role schedule and assign work, how the work is monitored, responsibility of this role if work quality falters).

Does this role oversee the work of others on a short-term basis (less than 12 months)?

This could be an additional responsibility that occurs during peak periods, or to ensure success of an event or campaign. This may include requesting pre-selected casual staff for short-term needs.

Yes

☐

No

☐

Please provide details about this responsibility (i.e. reason for the responsibility, number and type of positions, responsibility of this role if work quality falters).

Choose the following functional guidance responsibilities that occur in this role, if applicable: -

- ☐ Provide orientation and/or show procedures of own job to others
- ☐ Show others how to perform certain procedures in their jobs (rather than your own job)
- ☐ Have responsibility to lead change in procedures or technology for the unit
- ☐ Provide advice or technical expertise relied upon by others, including decision makers

Please provide an example of providing orientation and/or showing procedures of own job to others.

Please provide an example of showing others how to perform certain procedures in their jobs (rather than your own job).

Please provide an example of leading change in procedures or technology for the unit.

Please provide an example of providing advice or technical expertise relied upon by others, including decision makers.

This is the end of Section 6 of 14: Supervision and Functional Guidance. The answers that you have entered will be automatically saved once you hit the next button at the end of each page. At any point in the questionnaire you can leave it by closing your browser by clicking on the X at the top right of your

screen. You can continue filling out the questionnaire another time by clicking on the link that was sent to you in the email.

Section 7 - Planning and Coordination

Section 7 of 14: Planning and Coordination

The following questions refer to the responsibility for planning and coordination of activities and the extent to which others are affected.

Choose the following planning and coordination activities that occur in this role if applicable:

- ☐ Follow a schedule prepared by someone else
- ☐ Prioritize own activities to ensure deadlines are met
- ☐ Schedule tasks or activities performed by others
- ☐ Coordinate processes (e.g. cyclical review, USAT, renewal, promotion and tenure, etc.) relied upon by others
- ☐ Coordinate resources (e.g. time, people, money) used by others
- ☐ Plan or coordinate programs, events, conferences, athletic meets, meetings, calendars
- ☐ Have responsibility for development of budgets, requiring estimates of time and resources

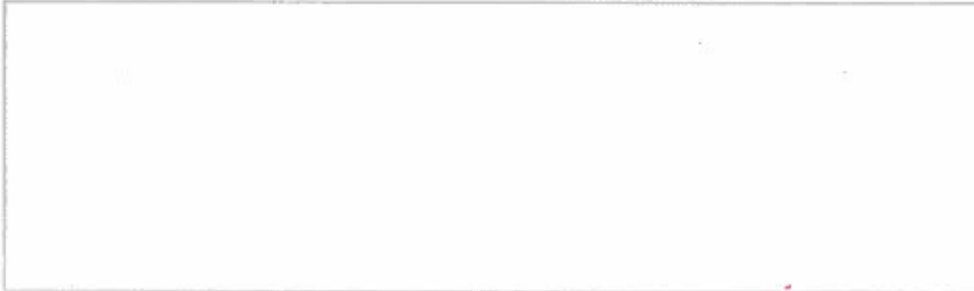
Please provide an example of following a schedule prepared by someone else.

Please provide an example of prioritizing own activities to ensure deadlines are met.

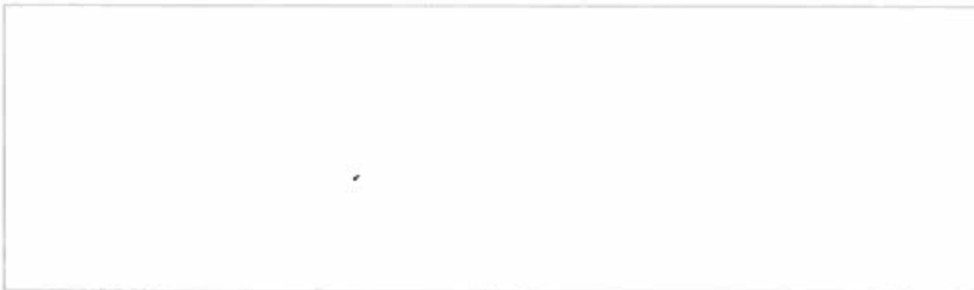
Please provide an example of scheduling tasks or activities performed by others.



Please provide an example of coordinating processes (e.g. cyclical review, USAT, renewal, promotion and tenure, etc.) relied upon by others.



Please provide an example of coordinating resources (e.g. time, people, money) used by others.



Please provide an example of planning or coordinating programs, events, conferences, athletic meets, meetings, calendars.



Please provide an example for the responsibility for development of budgets, requiring estimates of time and resources.



Does this role have responsibility for planning and/or coordinating projects?

Yes

☐

No

☐

Please provide an example of a project for which this job had planning/coordination responsibilities. Be sure to describe the size and significance of the project, along with the role and responsibility of this job.



This is the end of Section 7 of 14: Planning and Coordination. The answers that you have entered will be automatically saved once you hit the next button at the end of each page. At any point in the questionnaire you can leave it by closing your browser by clicking on the X at the top right of your screen. You can continue filling out the questionnaire another time by clicking on the link that was sent to you in the email.

Section 8 - Impact of Decisions

Section 8 of 14: Impact of Decisions

The following questions refer to the responsibility for decision making and the impact of these decisions on own work, the work of others or the broader University community.

Please provide an example of the highest level of decision that this role is expected to make without consulting a manager or other senior employee.

Consider current and recurring decisions that impact any of the following areas:

- Academic and/or non-academic programs or services
- Financial resources
- Physical resources

- Information resources
- Health/safety of others



Who is impacted by this decision? Select any that apply

- ☐ Individual colleagues within immediate work area
- ☐ Groups of faculty, staff and/or students within your department
- ☐ Individual faculty, staff and/or students in other departments
- ☐ Groups of faculty, staff and/or students in the broader faculty or University community
- ☐ Clients and business partners external to the University

Please provide an example of a decision that this role would refer to a manager or other senior employee for resolution.

Consider current and recurring decisions that impact any of the following areas:

- academic and/or non-academic programs or services
- financial resources
- physical resources
- information resources
- health/safety of others



Sometimes decisions are made with limited or inaccurate information, and/or changing circumstances, which can lead to errors. Select the statement below that best describes the impact or consequence of errors that might be made in the job.

Consider errors that might occur, even with reasonable care and checks and balances applied.

H.L.
f.d.

- ☐ Errors generally do not affect the quality of service, are readily detected and require little loss of time or money to correct.
- ☐ Errors may result in delays to succeeding steps or phases of work but are almost always detected before an effect is felt.
- ☐ Errors may cause work interruption and loss of time, and may not be readily detected.
- ☐ Errors may be costly to correct, require major reworking or cause major breakdowns and are difficult to detect.
- ☐ Errors are resource-intensive to correct and are extremely difficult to detect.

Provide an example of an error that could occur that fits the statement selected in the prior question. Be sure to illustrate the full result of this error, including how it would be detected, who it would impact and what would need to be done to correct the error.



This is the end of Section 8 of 14: Impact of Decisions. The answers that you have entered will be automatically saved once you hit the next button at the end of each page. At any point in the questionnaire you can leave it by closing your browser by clicking on the X at the top right of your screen. You can continue filling out the questionnaire another time by clicking on the link that was sent to you in the email.

Section 9 - Physical Effort

Section 9 of 14: Physical Effort

The following questions measure the duration and intensity of the physical demands required in the job. Intensity of physical effort is measured as low, moderate or high. Typical examples of low, moderate and high levels of physical effort are shown in the levels below:

Low:

- Work involves sitting most of the time, but may involve walking or standing for brief periods of time with choice of position or intermittent keyboarding throughout the work time.
- Work restricted to work station with little opportunity to move around for up to 3.5 hours per day.
- Periods of continuous keyboarding or other finger and hand movements for less than 20 minutes at a time uninterrupted by other activities.
- Occasional lifting and/or moving of light objects.

Moderate:

- Requires walking or standing for at least 1 hour at a time for 2 to 3.5 hours cumulatively per day.
- Work restricted to work station with little opportunity to move around for more than 3.5 hours per day.

- Periods of continuous keyboarding or other finger and hand movements (including clicking and scrolling) for at least 20 minutes at a time uninterrupted by other activities to a maximum of 3.5 hours cumulatively per day.
- Work in awkward physical positions, or on uneven terrain with possibility of regular breaks (i.e. relief at desired times) for 1 to 2 hours per day.
- Regular lifting and/or moving of objects weighing up to 20 lbs (9 kg), lighter awkward loads, or occasional lifting of heavy objects
- For jobs that are mostly sedentary, requires work with light tools and equipment for 2 to 3.5 hours per day.

High:

- Requires walking or standing for at least 1 hour at a time for more than 3.5 hours cumulatively per day.
- Periods of continuous keyboarding or other finger and hand movements (including clicking and scrolling) for at least 20 minutes at a time uninterrupted by other activities beyond 3.5 hours cumulatively per day.
- Work in awkward physical positions, or on uneven terrain for more than 2 hours per day
- Regular lifting and/or moving of heavy objects, more than 20 lbs (9 kg).
- Work with light tools and equipment for more than 3.5 hours per day.

Using the example descriptions above for Low, Moderate and High, select the level that most accurately describes the physical demands required in this job on most days.

- ☐ Low
☐ Moderate
☐ High

Review the list of physical demands in the prior question.

Do any of the physical demands from the Moderate or High examples occur on a regular and recurring basis in this job, but not every day?

Yes

☐

No

☐

For the physical demands from the Moderate or High examples that occur on a regular and recurring basis in this job, but not every day:

List the physical demands. Be sure to fully describe the activity that results in these physical demands.

H/A
100

How often does this activity occur?

When it does occur, how long does the activity last each time (in hours)?

Review the list of physical demands in the prior question.

Do any of the physical demands from the High examples occur on a regular and recurring basis in this job, but not every day?

Yes

☐

No

☐

For the physical demands from the High examples that occur on a regular and recurring basis in this job, but not every day:

List the physical demands. Be sure to fully describe the activity that results in these physical demands.

How often does this activity occur?

When it does occur, how long does the activity last each time (in hours)?

This is the end of Section 9 of 14: Physical Effort. The answers that you have entered will be automatically saved once you hit the next button at the end of each page. At any point in the questionnaire you can leave it by closing your browser by clicking on the X at the top right of your screen. You can continue filling out the questionnaire another time by clicking on the link that was sent to you in the email.

Section 10 - Concentration

Section 10 of 14: Concentration

The following questions measure the duration and intensity of mental and sensory demands required to perform the job. For the questions below that require a time estimate, assume a 35-hour work week (i.e. the answers from all questions in this section should add up to 35 hours).

In a typical week for this job, are there any tasks that require significant understanding and manipulation of the content for output?

Examples include:

- Complex word processing or graphical layout
- Creation of spreadsheets including new formulae
- Advising students
- Providing detailed information
- Minute taking at meetings and transcription
- Cleaning (special protocol)
- Careful listening/observation or reading to discern relevant information and/or take rapid action
- Using tools or mechanical equipment
- Completing multi-step forms, applications and protocols
- Performing standardized experiments, repairs and/or routine calibration using established standards

Yes

☐

No

☐

Please indicate which tasks occur on a weekly basis

- ☐ Complex word processing or graphical layout
- ☐ Creation of spreadsheets including new formulae
- ☐ Advising students
- ☐ Providing detailed information
- ☐ Minute taking at meetings and transcription
- ☐ Cleaning (special protocol)

HL
H0

- ☐ Careful listening/observation or reading to discern relevant information and/or take rapid action
- ☐ Using tools or mechanical equipment
- ☐ Completing multi-step forms, applications and protocols
- ☐ Performing standardized experiments, repairs and/or routine calibration using established standards

Please indicate the estimated time spent on each task weekly (in hours)?

(If you indicated that none of the prior tasks occur the total below time below will remain 0 (zero))

» Complex word processing or graphical layout	0
» Creation of spreadsheets including new formulae	0
» Advising students	0
» Providing detailed information	0
» Minute taking at meetings and transcription	0
» Cleaning (special protocol)	0
» Careful listening/observation or reading to discern relevant information and/or take rapid action	0
» Using tools or mechanical equipment	0
» Completing multi-step forms, applications and protocols	0
» Performing standardized experiments, repairs and/or routine calibration using established standards	0
Total	0

In a typical week for this job, are there any tasks that require detailed or precise work generating or creating the content for output?

Examples include:

- Graphic design
- Identifying and responding to urgent situations that require intervention
- Therapeutic counselling
- Designing and coding software, applications and/or programs
- Transcribing from Dictaphone or recording
- Facilitating meetings/groups
- Instructing
- Performing scientific/technical observation or intervention
- Calibrating complex instruments
- Using precision tools
- Fabrication of tools or equipment

- Developing solutions to complex problems where interruptions would cause disruption of the thinking process

Yes

☐

No

☐

Please indicate which tasks occur on a weekly basis

- ☐ Graphic design
- ☐ Identifying and responding to urgent situations that require intervention
- ☐ Therapeutic counselling
- ☐ Designing and coding software, applications and/or programs
- ☐ Transcribing from Dictaphone or recording
- ☐ Facilitating meetings/groups
- ☐ Instructing
- ☐ Performing scientific/technical observation or intervention
- ☐ Calibrating complex instruments
- ☐ Using precision tools
- ☐ Fabrication of tools or equipment
- ☐ Developing solutions to complex problems where interruptions would cause disruption of the thinking process

Please indicate the estimated time spent on each task weekly (in hours)?

(If you indicated that none of the prior tasks occur the total below time below will remain 0 (zero))

» Graphic design	<input type="text" value="0"/>
» Identifying and responding to urgent situations that require intervention	<input type="text" value="0"/>
» Therapeutic counselling	<input type="text" value="0"/>
» Designing and coding software, applications and/or programs	<input type="text" value="0"/>
» Transcribing from Dictaphone or recording	<input type="text" value="0"/>
» Facilitating meetings/groups	<input type="text" value="0"/>
» Instructing	<input type="text" value="0"/>
» Performing scientific/technical observation or intervention	<input type="text" value="0"/>
» Calibrating complex instruments	<input type="text" value="0"/>
» Using precision tools	<input type="text" value="0"/>
» Fabrication of tools or equipment	<input type="text" value="0"/>
» Developing solutions to complex problems where interruptions would cause disruption of the thinking process	<input type="text" value="0"/>
Total	<input type="text" value="0"/>

In a typical week, estimate how much time (in hours) is spent on tasks that require very little attention to the content or meaning of the output?

HL
HLO

Examples include:

- Alphabetic filing
- Cleaning (normal protocol)
- Shelving books or supplies
- Monitoring machines
- Attending to demands for recurring information
- Inputting or formatting data transferred from another source

0

The total of all time estimates in your prior questions on concentration add up to 0. The total should add up to 35 hours. If applicable, go back to the prior questions and adjust the times so that the total is 35 hours.

Select yes below if the total adds up to 35 hours, or no if there is an intentional reason for the total to add to more or less than 35 hours.

Yes

☐

No

☐

Please explain why the total time estimates for concentration are more or less than 35 hours.

Potential explanations include:

- Non-standard work week (part-time or shift work)
- Some tasks occur simultaneously (e.g., advising students and providing detailed information)

If applicable, please indicate any additional information that would allow a better understanding of the concentration demands of this job.

This is the end of Section 10 of 14: Concentration. The answers that you have entered will be automatically saved once you hit the next button at the end of each page. At any point in the questionnaire you can leave it by closing your browser by clicking on the X at the top right of your screen. You can continue filling out the questionnaire another time by clicking on the link that was sent to you in the email.

Section 11 - Physical Environment/Health and Safety Risks - Part 1

Section 11 of 14: Physical Environment/Health and Safety Risks - Part 1

The following questions collect information on the disagreeable conditions in the physical environment in which the work must be performed. Only consider conditions that are inherent to the job. Assume all necessary measures to protect comfort have been applied.

The chart below lists disagreeable conditions that are present in some jobs. Please indicate the frequency with which the condition occurs in this job.

	Never/Rare (less than 10% of the time annually)	Occasional (10 - 33% of the time annually)	Frequent (33 - 66% of the time annually)	Almost continuous (more than 66% of the time annually)
Exposure to biological or chemical odours or substances	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exposure to dust, dirt, grease or oil	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exposure to high noise levels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Poor lighting or glare	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Requirement to wear cumbersome or uncomfortable protective equipment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sustained machine or equipment vibration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Working indoors in environments that are extremely hot, cold, wet or poorly ventilated	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Working outdoors in inclement weather conditions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Please provide an example of each condition that occurs more than 10% of the time annually.



If there are any other disagreeable conditions present in the job that were not described in the chart above, please describe them below.



This is the end of Section 11 of 14: Physical Environment. The answers that you have entered will be automatically saved once you hit the next button at the end of each page. At any point in the questionnaire you can leave it by closing your browser by clicking on the X at the top right of your screen. You can continue filling out the questionnaire another time by clicking on the link that was sent to you in the email.

Section 12 - Physical Environment/Health and Safety Risks - Part 2

Section 12 of 14:

Physical Environment/Health and Safety Risks - Part 2

Queen's University is committed to the prevention of illness and injury through the provision and maintenance of a healthy and safe campus. The University endeavours to meet its responsibilities for the health and safety of the members of its community by complying with relevant health and safety standards and legislative requirements, and by assigning general and specific responsibilities for workplace health and safety.

The following questions collect information on the level of residual risk that is present after all safety equipment has been provided and all safety precautions have been taken.

The chart below lists hazards that are present in some jobs. For each hazardous condition, indicate the frequency with which it is present in this job.

	Never/Rare (less than 10% of the time annually)	Occasional (10 - 33% of the time annually)	Frequent (33 - 66% of the time annually)	Almost Continuous (more than 66% of the time annually)
Climbing on ladders	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exposure to infectious diseases	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exposure to toxic chemicals/biohazards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Handling machinery with moving parts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Potential exposure to bites or other injuries from working with animals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Potential for physical attacks by others	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repetitive movements causing strain	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Risk of motor vehicle accident	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Slip and fall hazards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please provide an example of each condition that occurs more than 10% of the time annually.

Are there any other potential hazards in the job that have been overlooked? If so, please provide an example below and describe the frequency with which it occurs.

This is the end of Section 12 of 14: Health and Safety. The answers that you have entered will be automatically saved once you hit the next button at the end of each page. At any point in the questionnaire you can leave it by closing your browser by clicking on the X at the top right of your

screen. You can continue filling out the questionnaire another time by clicking on the link that was sent to you in the email.

Section 13 - Job Pressure

Section 13 of 14: Job Pressure

The following questions relate to job pressures in the work and/or work environment. **Assume that all necessary measures to protect comfort have been applied.**

The chart below lists conditions relating to job pressures that are present in some jobs. Please indicate the frequency with which the condition occurs in this job.

	Never/Rare (less than 10% of the time annually)	Occasional (10 - 33% of the time annually)	Frequent (33 - 66% of the time annually)	Ongoing (more than 66% of the time annually)
Expectation to meet fixed production or sales targets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exposure to difficult situations that involve conflictive, hostile or violent reactions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exposure to situations involving emotionally charged or disrespectful behaviour	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exposure to situations involving the distress of others such as illness, socio-economic problems and death	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Extensive driving	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Extreme vigilance to ensure avoidance of significant negative impact or consequences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Isolated workspace, or where privacy may be limited	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overnight travel (not compensated separately)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Schedule requires irregular work hours, or work during evenings or weekends for which NO shift premium or other compensatory provisions are provided in the collective agreement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Simultaneous deadlines, interruptions / distractions and/or unpredictable or urgent assignments (e.g., multiple competing sources of work)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please provide an example of each condition that occurs more than 10% of the time annually.



Select the statement below that best describes the frequency of change within the work environment.

Examples could include changes in:

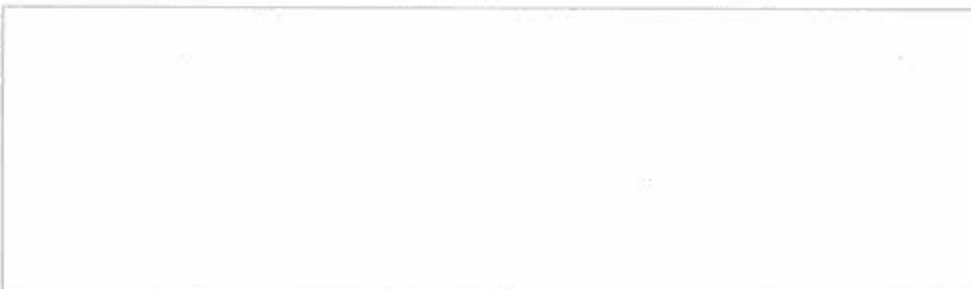
- practices or procedures
- policies
- technology

- ☐ Changes occur every couple of years
- ☐ Changes occur every year
- ☐ Multiple changes occur within the year

Please provide further details of the pace and scope of change in the work environment. Be sure to provide examples of practices, procedures, policies or technologies that are regularly changing and how this job is affected by these changes.



If there are any other job pressures present in the job that were not described in the chart above, please describe them below.



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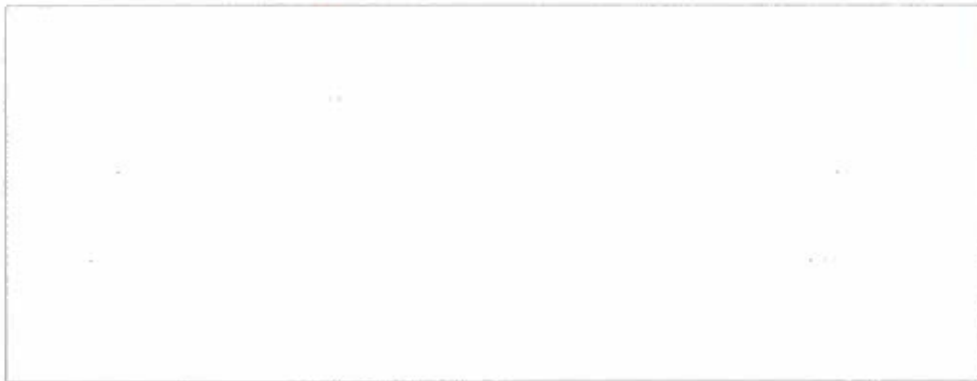
Section 14 - Additional Information

Section 14 of 14: Additional Information

If applicable, please define any abbreviations used in this questionnaire.



If applicable, indicate any additional information not covered in the preceding questions that would allow a better understanding of the job.



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