

Both the guide and the position description questionnaire (PDQ) are on the web site at [www.psc.gov.sk.ca/cupeclassplan](http://www.psc.gov.sk.ca/cupeclassplan). Ask Human Resources in your department for assistance in helping you to complete the form, if required. The PDQ is required under the Public Service Regulations and CUPE Collective Bargaining Agreement. The parties have agreed to the form and the following guidelines for its use.

The design of this form allows for completion of specific portions of the form, as per the chart below. **Note:** if there has never been a PDQ completed for the position, one **must** be completed.

SITUATION	ACTION REQUIRED
<b>Vacancy, including new positions:</b>	
a. Additional funding is received to increase the complement of an existing one- to-many assignment.	a. Manager requests an increase to head count through Human Resources (HR).
b. A vacant position which has already been classified has a change in the assignment.	b. Manager completes the entire form and submits along with an org chart to JJEC.
c. Additional funding is received and the assignment is unique from other positions.	c. Manager completes the entire form and submits along with an org chart to JJEC.
<b>Encumbered reviews:</b>	
a. TPHD over 90 days – straight backfill	a. Manager requests HR provide TPHD (temporary reclassification) citing the MIDAS position number being backfilled.
b. TPHD over 90 days – additional duties	b. Manager completes and submits the entire form to JJEC to provide TPHD.
c. Permanent classification review where the duties are identical to another job.	c. Manager and employee submit signed front page of the form and org. chart to JJEC identifying the MIDAS position number(s) of jobs already classified with this job assignment.
d. Permanent classification review where the job assignment is new or has changed substantially since the last review.	d. Manager and employee complete the entire form and submit to JJEC identifying the specific changes. If there are numerous employees, a separate sheet of signatures can be attached to the job description form.

## **Organizational Requirements**

When job assignments change it is essential to review the classification levels in order to:

- Ensure due process in administration of the employment contract (the legal commitment to pay a specific salary for the assigned responsibilities).
- Mitigate morale issues and misperceptions regarding what the appropriate pay levels are for various levels of responsibility.
- Communicate the assigned responsibilities, authority levels, human relations and knowledge expectations to the employee, as these form the basis upon which performance standards are set.
- Ensure clarity in organizational roles.
- Ensure maintenance of competitive market position as job matching is based on reference to existing PDQs.
- Ensure understanding of the job content in order to establish competencies for recruitment and work force adjustment.
- Communicate job assignments to applicants during recruitment.

## **Legal Requirements**

1. The *Public Service Act* (Section 17) obligates the Public Service Commission to maintain classification levels appropriate to the assigned duties and responsibilities.
2. The Act authorizes the Commission to ascertain the duties and responsibilities of all positions in the classified service and allocate them appropriately.
3. Both the *Public Service Act* and collective bargaining agreement provide permanent employees the right to request a review when their position's responsibilities change.
4. The Public Service Regulations (7.2) require the Permanent Head (normally delegated to managers) to report any material change in duties and responsibilities on forms designated by the Commission (7.3). Where positions undergo significant changes and PDQs are not submitted for review, the Commission has the authority to, and will, initiate and complete classification reviews.
5. The CUPE Collective Bargaining Agreement [23.02 c) i)] requires permanent employees who have the right of review, to use the designated form (PDQ) when submitting requests for review to the Joint Job Evaluation Committee (JJEC). The Job Evaluation Maintenance Procedures (7.2) provides JJEC the right to initiate classification reviews in order to maintain the job evaluation program.

## **General things to keep in mind when completing the PDQ**

You may find it helpful to read the whole form before starting to complete it. In addition, you should become familiar with the job evaluation sub-subfactors, with particular attention to the "Notes to Raters" for each sub-subfactor.

Please do not use words and phrases from the job evaluation subfactors. Evaluators are trained to not be influenced by direct quotations from the subfactors. Also, jobs have varying responsibilities that may be

equivalent to different levels within a subfactor. Trying to write a PDQ to attain a particular rating may result in a description that is not indicative of the assignment and there is no guarantee that it will have a positive effect on the classification.

Another suggestion when writing the PDQ is to keep it simple. Remember that the PDQ is going to be read by someone whose field of study is different than yours. Looking at the BMs can be helpful when looking for guidance on format.

Different jobs are often responsible for different aspects of the same program. As a result it is important to ensure that the PDQ makes the position's role clear (e.g., between peers and between managers and their staff). Please ensure that the roles and responsibilities listed are indeed those of the position and not of other positions, the branch, or the department as a whole.

After completing a section on the form, go back to the question and ensure that the information really answers the question that has been asked. It is also helpful to ask someone who does not know your job (e.g., family member, friend) to read the PDQ to see if they understand the essence of why the job exists and what it is expected to achieve.

There should be no need for the completed PDQ form to be longer than 8 pages. Every effort should be made to be clear and concise.

### **Suggestions relating to specific sections on the PDQ**

#### **Front Page**

Please check the appropriate box for the reason for the request and ensure required attachments are included. The "Five Year Review" box is for PDQs completed at the request of JJEC for maintenance of the job evaluation plan.

#### **Explanation of Reason(s) for Job Evaluation Request**

In order for a classification review to be initiated, there must be sufficient change to the job assignment to warrant a review. This section identifies what change has happened.

In some instances, changes will not be significant enough to warrant a change in classification. Therefore, requests for classification review are not appropriate, and may be denied (e.g., increases or decreases in the amount of time spent on existing responsibilities; changes in working title, a different method of performing the same work).

#### **Primary Responsibilities**

The form asks that you list the responsibilities assigned to the job, in order of importance. This does not necessarily mean that the responsibility on which you spend the majority of your time will be the first one listed.

The important thing to remember here is to provide a broad description of overall responsibilities, not detailed tasks. The detail will be provided on the rest of the PDQ. If you want to see examples of how this is done, take a look at the Benchmarks. The primary responsibilities describe the main reasons that the job exists and does not include everything that the job does. The primary responsibilities are the typical nature/essence of the job and the job's purpose. These are broad statements and 3 to 7 responsibilities are usually sufficient to describe the key expectations of a job.

When completing the form, begin statements with a verb and use the present tense (e.g., develops as opposed to developed).

Use the present tense and avoid technical jargon and abbreviations (unless you define them). Writing in a passive tense (e.g., a research project will be conducted) does not make it clear whether it is the position's responsibility or whether someone else is doing it.

Avoid pronouns (I, we, she, he, it). An important thing to remember is that it is the job being evaluated, not the person.

Avoid performance laden words such as excellent, difficult, accurate, the most complex, efficient, etc.

Avoid words that are subject to varying interpretation (e.g., assists, coordinates, supports, participates, as required, may, prepares, helps, deals with, handles, etc.). Not only are these words unclear, they usually give the impression that the job has less responsibility than it does. If you use one of the words, explain what you mean. For example, "Assists the policy committee by distributing new policies for review by affected interest groups, gathering the responses and collating the suggestions by category for the committee to review".

Some examples of clearly written primary responsibilities:

- Checks all payments for accuracy and sends payments requiring special processing to the cash mail clerk.
- Develops and delivers professional development for nurses to enhance the delivery of services and programming for residents.
- Provides secretarial support to the Regional Management Team.
- Develops client case plans and provides counseling, guidance and direction to clients to promote adherence to case plan and to live responsibly in the community.
- Diagnoses equipment problems using mechanical, electrical and computerized testing equipment.
- Provides personal hygiene care (dressing, bathing, grooming, etc.) to residents on the cottage.

Although these should be broad statements of the job's responsibilities, be careful **not** to make them so generic that they don't indicate what the program/service responsibilities are. For example, please do not make statements like the following:

- Initiate actions to address goals targeted.
- Increase the department's presence as a monitor of impacts.
- Assist in maintaining data base.
- Act as senior liaison with other departments, government agencies and industry representatives.

## **Subfactor 1A – Knowledge**

Identify what formal educational designation is required to perform the job including the entrance qualifications. It must be evident from the rest of the PDQ why the body of knowledge attained in that designation is required to be brought to the job - why it is needed to do what in the job.

It is important to remember that when evaluating this subfactor JJEC is looking at the job, not the employee. Only that body of knowledge required to perform the assigned duties is measured and not the qualifications possessed by the incumbent.

For example:

- This job requires completion of Grade 12 plus 16 weeks of post secondary education in Secretarial Studies.
- The job requires completion of Grade 12 and a four year nursing degree from an accredited post secondary educational institute and registration with the Registered Psychiatric Nurses Association of Saskatchewan or the Saskatchewan Registered Nurses Association.
- This job requires Grade 12 or equivalent and completion of a 4-year journey carpentry trade designation.

## **Subfactor 1B - Experience**

In the first box please describe the knowledge that must be learned through experience either from previous jobs or life experience. Also identify any program related knowledge that must be brought to the job rather than learned on the job. This includes knowledge of client/stakeholder groups, programs of own and other branches or agencies. Most jobs will not have this requirement, for example if the job is an entry or working level job, there isn't a requirement to bring program related knowledge – rather, it would be learned on the job. However, some supervisory jobs do require program specific knowledge to be brought to the job. Eg., see BM 11 and 25

In the next box describe the knowledge that must be learned through experience after the employee has commenced in the position in order to perform the job assignment. This could include acts, regulations and policies, programs delivered by the department, clients and stakeholder groups.

It is important to note that when JJEC is measuring the length of time it would take to gain this experience, consideration is given to the length of time for each learning. For example, due to circumstances of the job and the experiences required, it may take 3 years to gain all the experiences required but it may only be 18 months of actual learning. It is the 18 months that would be credited, not the 3 years.

Sometimes it is difficult to determine where certain knowledges/experience should be listed. For example, a job needs knowledge of how to operate a computer including knowledge of how to manipulate information in databases. This would be knowledge to list in question 1A, as knowledge required prior to being hired. The job also needs knowledge of the specific custom built database used in the branch in

order to input data and run specific reports and queries. This knowledge/experience would be listed in subfactor 1B, as experience gained after being hired.

**Subfactor 2A – Problem Solving**

As opposed to the Primary Responsibilities section which asks for broad statements, in this section you need to provide specific examples of typical problems, issues, or complexities encountered in the job. The key points here are that only three examples are needed and they should be typical problems, not things that happen once in a while. This is because the subfactor measures the typical problems and three examples are enough for an evaluator to determine the appropriate level.

Make sure you identify a specific example of a problem rather than a statement of an activity. For each problem that you list, outline the actions that you take to resolve the problem. Please include procedures, manuals, policies, technical standards, professional guidelines, etc. to which you refer to help you solve the problem. Again, be specific and provide the information that demonstrates the thought process and analysis required to resolve the problem. However, please keep in mind that the PDQ form is not meant to be a procedural manual for how to do the job assignment. Describing the step by step processes of how a job is performed often leaves the impression that the job is less difficult. Once you start describing the solutions you might take up more space than half a page but you should not need more than a page.

An important thing to keep in mind throughout these questions is that the examples provided should relate back to the primary responsibilities. For example, typical examples of work should reflect the major responsibilities assigned to the job.

Some examples of clearly written problem and solution statements are:

<b>Problem</b>	<b>Solution</b>
1. Correspondence for typing is missing information or is difficult to read.	1. Speaking with the author to obtain missing information or to clarify the written information.
2. An employee is questioning their service date.	2. Gathering information from Valley View Centre files, payroll files/paycards, MIDAS and HRS (for history); contacting previous Saskatchewan government employers for confirmation; confirming outside employment with PSC; determining the date as per the application collective agreements, PS Act and Regulations, HR policies and department policies; informing the employee, supervisor, payroll, HRB, Union updating the system and personnel file.
3. The steam generating boiler shuts down unexpectedly or the boiler will not start or respond to the operators input into the controls.	3. Talking to the operating engineer to determine if anything unusual was happening at the time of the shut down. Checking safety devices that warn of catastrophic failure or explosion. If none are found

	tripped or failed, then proceeding to systematically check the components that could cause the boiler to shut down using test equipment such as hand held computer controls that configure the controls of the boilers, or by checking the operating manual for trouble shooting steps to follow. By eliminating components one step at a time the failed component will be found and can then be repaired or replaced and the boiler can be relit and put back into service.
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**Subfactor 2B – Responsibility for People and Assets**

Provide examples of corrective decisions or actions that this job is required to take independently (i.e., no one else checks the decision before it is implemented). It is important to note that the person making the decision is not required to take the actions necessary to implement the decision. Again it is important to remember what the subfactor is measuring and what it isn't. Do not provide examples of what could go wrong if you make a mistake, or the harm or hardship your decision may cause other people. Rather, provide examples of decisions you make to correct a situation that has been caused by someone or something other than you; what the impact is on finances, the environment, the well being of others, etc.; and how frequently the decision is made.

It is important to keep in mind here that you may assess situations every day and determine that nothing needs correcting. This is not what this subfactor is measuring. What we are looking for here are only those occasions where you assess a situation and determine that you need to make a decision to correct someone else's error or prevent injury or harm to others or material or financial loss.

Please ensure that you follow each example across the columns in the table. In the first column identify the decision that the job makes, in the second column explain why the decision is being made, (i.e., to protect who from what or to correct what situation), and the third column identify how often this type of decision is made. *If the corrective decision relates to the safety of others, identify in the fourth column how often these situations actually escalate to the point of physical danger. (Note: this would require a change to the PDQ. Is this column necessary or should it remain as is?)*

For example:

<b>Corrective Decision</b>	<b>Impact of the Decision</b>	<b>Frequency the corrective decision is made</b>	<b>Frequency the situation escalates to physical danger</b>
Slow resident down who is eating too fast, give them a smaller utensil or a fork instead of a spoon, cut their food into smaller bites, or have them put their utensil down between bites, etc.	Prevents possible choking or aspiration of residents	Daily	On average, a resident actually begins to choke once a week

Develop and/or modify vocational treatment plans for clients.	Improves client’s self-esteem and reduces their incidence of disruptive behaviour towards themselves, their peers and staff.	Once a week	On average, I modify a client’s vocational treatment plan less than once a month
Correcting errors made by other staff on expenditures so that vendors are issued cheques in the correct amount and on time (e.g., contract payments, grant payments).	Financial loss to the government occurs when staff do not process department financial transactions correctly or on time. Timeliness of payments ensures no interest is paid.	Daily	Not applicable

**Subfactor 6 – Supervision of Others**

Many jobs may not have any responsibility for the work of others. In that case, skip this section and proceed to Subfactors 3, 4 5 and 8.

In this section please check the boxes that apply to your responsibilities. If only part of the statement applies, cross out the part that does not apply to your job. In the second column explain what you are required to do and then check either the “periodically” or “continually” column. If you have checked “periodically”, please state how often (e.g., once a week, once a month, once every 2 months, etc.).

If the responsibility for the supervision of others only occurs in the absence of your supervisor, this should be covered by TPHD and not through the permanent classification process.

*Please keep in mind that this section of the form will be cross-referenced with the organization chart. If the PDQ identifies all of the complete boxes on a continual basis, there should be staff on the org chart reporting to the position.*

**Subfactors 3, 4 5 & 8 – Mental Effort, Physical Activity, Dexterity and Working Conditions**

Please list the activities that you are required to perform in your job. In the next column indicate the number of hours spent on each activity. Please keep in mind that the total number of hours cannot exceed your normal work week.

Then review the conditions listed on the next page of the PDQ form, and for each of the four subfactors, identify which conditions apply to each of the activities. There is a guide at the end of Subfactor 5 indicating activities and whether they require speed and/or accuracy of physical coordination or neither.

For example, if you list keyboarding as one of your activities you could identify:

- #3 - sensory concentration where exactness is important under Subfactor 3;
- #15 - constant periods of sitting where I can't get up or I am confined to a certain position under Subfactor 4;
- #19 - requires either speed of movement or accurate coordination of physical movement under Subfactor 5;
- #22 - repetitive tasks and #23 - working near a lot of background noise (under 85 decibels) under Subfactor 8.

### **Subfactor 7 – Interaction**

In the first box outline three examples that best represent the requirement for the job to have contact with others (e.g., influence others or modify their actions or behavior through explanation, negotiation/mediation, counseling, therapy, etc.) The “others” referred to in this section could be anyone internal or external to government *except the position's staff*. It is important here to be specific in explaining exactly what is done, rather than just use the words negotiate, mediate, counsel, etc. For example, who are you mediating between, what about, what are the opposing arguments, how do you mediate?

Some examples of clearly written statements:

- Responds to complaints from staff by explaining why substitution of products are made (e.g., donuts were requested on the requisition to Food Services but there were none so cookies were provided).
- Defends own decisions and explains established policy and procedures to staff complaining about their leave entitlements. Provides an explanation of how the balance was arrived at, the regulations and policies applied and provides examples of similar situations in order to aid the employee in understanding how the policies apply to their situation.
- Explains to laundry staff why there may be delays in the repair and maintenance of their equipment (e.g., waiting for a part).

In the second box provide examples where the job is required to transfer knowledge to others through presenting (oral or written), demonstrating, teaching, etc. Indicate the method used and if the audience is likely to challenge the validity of the content, explain why and what is their ability to challenge the information. Again, the “others” referred to in this section could be anyone internal or external to government *except the position's staff*.

Some examples of clearly written statements:

- Delivers training for independent program design and delivery to CBO staff regarding the behaviour of clients (e.g., placement decisions, how to assess people with intellectual disabilities, program design, response to difficult behaviours, controlling stimuli, preparing referrals to other professionals (e.g., psychiatrists, language pathologists)]. The training involves 10-12 full day

- Gives advice and instructions when training new staff regarding the most efficient way of doing the job and proper use of equipment (e.g., scrub machine), disinfectants, chemicals and procedures.

### **Comments Page**

The last page provides space for employees to add whatever information about their job they would like to stress, include more detail about, etc.

There is also a section for the position's immediate supervisor to add comments and for the position's out-of-scope manager to add any comments about the job assignment.

## Request for Review Form

### Reason for Request Please Check the Appropriate Box(es)

- Creation of New Job (Attach draft Job Description)
- Six-month Review of New Job (Attach completed Position Description Questionnaire and Job Description)
- Change in Job Duties and/or Responsibilities (Attach completed Position Description Questionnaire and revised draft Job Description)
- Five Year Review

Working Title: \_\_\_\_\_ Classification Level: \_\_\_\_\_ Position #: \_\_\_\_\_

Location: \_\_\_\_\_ Department: \_\_\_\_\_

Employee(s) Name: \_\_\_\_\_

Immediate Supervisor's Name: \_\_\_\_\_

Immediate Supervisor's Working Title: \_\_\_\_\_

#### Explanation of Reason(s) for Job Evaluation Request:

#### Request Initiated by:

Incumbent(s)                       Employer                       JJEC

Authorization: Certified as an accurate description of the work assigned and that a copy of this description has been given to the employee. An organizational chart is attached.

\_\_\_\_\_  
Permanent Head or Delegated Out-of-Scope Manager's Signature      Date      Phone Number

\_\_\_\_\_  
Employee Signature      Date      Phone Number

#### PLEASE SEND ORIGINAL TO:

**JOINT JOB EVALUATION COMMITTEE  
BOX 1300 MOOSE JAW SK S6H 4R2  
FAX: 306-694-3003**

#### JJEC TO SEND COPIES TO:

JJEC Co-chairs       Immediate Supervisor       MIDAS       Union

JJEC retains original



**POSITION DESCRIPTION QUESTIONNAIRE**

List the 4 – 8 PRIMARY responsibilities assigned to the job, in order of importance.

**SUBFACTOR 1A - KNOWLEDGE**

Describe the formal educational designation (i.e., license, formal or professional designation, or diploma/certificate) required of anyone to do the job.

**SUBFACTOR 1B – EXPERIENCE**

Please describe required experience in any related work, or work in a lower position and other relevant work and life experience, which are necessary for performance of the job.

Describe the knowledge requirements that must be learned after an employee is hired to perform independently at the full working level and why this knowledge is needed to do the job.

**SUBFACTOR 2A – PROBLEM SOLVING**

List 3 examples of problems, issues, or complexities most typically encountered in the job, that you are required to resolve on your own.

Describe what analysis you required to solve this problem including procedures, manuals, policies, technical standards, professional guidelines, etc. which assisted you in solving this problem.

**SUBFACTOR 2B – RESPONSIBILITY FOR PEOPLE AND ASSETS**

Provide examples of corrective decisions or actions that this job is required to take independently to directly prevent injury or harm to others or directly prevent material or financial loss.	Describe the impact (e.g., the loss, threat being corrected) of these decisions on finances or the well being of others.	How frequently is this decision made (weekly, once a month, daily, less than once a month)?	How often does the situation actually escalate to physical danger (weekly, once a month, less than once a month)?

**SUBFACTOR 6 – SUPERVISION OF OTHERS**

Check the responsibility(ies) for the work of others and the frequency:			
	Explain what specifically the job is required to do	Periodically	Continually
<input type="checkbox"/> Planning, organizing, scheduling, coordinating of work			
<input type="checkbox"/> Assigning of work and/or personnel			
<input type="checkbox"/> Maintaining quality, accuracy, quantity of work			
<input type="checkbox"/> Giving advice and direction for ongoing performance improvement and demonstrating job functions and procedures			
<input type="checkbox"/> Ensuring the application of work methods, work procedures and work standards			
<input type="checkbox"/> Resolving conflicts between staff			

**SUBFACTORS 3, 4, 5 AND 8 – MENTAL EFFORT, PHYSICAL ACTIVITY, DEXTERITY, DISAGREEABLE CONDITIONS**

Identify activities required to be performed by the job and the number of hours per week they are performed. This includes activities requiring sensory concentration, physical effort, co-ordination of physical movement, and those performed under adverse conditions. Please note: Total hours cannot exceed the hours in a normal work week.

ACTIVITY – List the activities required to be performed by the job.	NUMBER OF HOURS – identify the average number of hours per week each activity is performed	CONDITIONS – From the list of conditions attached, indicate by sub-factor and # which ones correspond to each activity listed in the first column			
		SF3	SF4	SF5	SF8
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					
14.					
15.					
	<b>Total Hours: <u>Total hours cannot exceed the hours in your normal work week.</u></b>				

## CONDITIONS

### Sub-factor 3

1. can shift attention away but continue to perform the task
2. mental demands from working directly with others
3. sensory concentration where exactness is important (if interrupted have to stop what you are doing)
4. working with people who require support & empathy
5. leading groups where I have to listen, clarify, restate, summarize responses
6. sensory concentration is critical, if I am interrupted even for a moment it could cause harm to others or damage to property
7. working directly with people who have learning, speech or other sensory barriers

### Sub-factor 4

8. walking
9. sitting
10. lifting/carrying/pushing weights less than 5kg
11. standing
12. climbing
13. lifting weights over 5kg but under 10 kg
14. work in a confined position
15. constant periods of sitting where I can't get up or I am confined to a certain position (for example: equipment operator driving tractor, person using a sewing machine, etc.)
16. lifting weights over 10 kg
17. stooping, kneeling, crouching, reaching, stretching

### Sub-factor 5

18. requires neither speed of movement or accurate coordination of physical movement (example: walking – see representative examples for sub-factor 5)
19. requires either speed of movement (may be a controlled speed - example - using a sprayer when painting) or accurate coordination of physical movement
20. requires both speed of movement and accurate coordination of physical movement. (example: a welder has to lay a bead with a controlled speed and use accurate coordination to put it in the right place)

### Sub-factor 8

21. done under deadline pressures
22. repetitive tasks
23. working near a lot of background noise (under 85 decibels)
24. road travel in good conditions

25. working in open heights (below 5 feet)
26. in contact with glue, cleaning agents, toner, insects, motor oil/grease dust dampness
27. exposed to unpleasant odors
28. working on slippery floors
29. dealing with rude or impolite people
30. eye strain from bright light, glare, with video display terminals
31. in direct contact with longer term treatable diseases through exposure to bodily fluids
32. travel in adverse weather
33. working in open heights from 5 feet up to 10 feet
34. in contact with vibration from equipment
35. making repairs to electrically live equipment
36. exposure to loud noise (over 85 decibels) i.e. ear protection is required
37. travel in adverse weather on unmaintained roads; operating snow removal equipment
38. face to face anger or hostility directed at me
39. working in close proximity to pressurized or heated equipment or systems over 165 psi or having an internal term of 250f
40. working in close proximity to radiation or volatile substances including high voltage (over 750 volts)
41. working around moving equipment
42. working in open heights 10 feet or more
43. working with asbestos
44. physical intervention with individuals exhibiting angry or hostile behavior
45. working in close proximity to toxic fumes in areas of poor ventilation
46. welding, soldering, brazing
47. working outdoors in extreme weather
48. travel where there is severe restriction in visibility requiring significant caution
49. operating snow removal equipment during storm conditions
50. in direct contact with non treatable diseases through exposure to bodily fluids

**SUBFACTOR 7 – INTERACTION**

Describe 3 examples that best represent the requirement for the job to have contact with others (e.g., modify their actions or behavior through explanation, negotiation/mediation, counselling, therapy, etc.).

Describe the knowledge this position must transfer to others through presenting (oral, or written), demonstrating or teaching, etc. Indicate the method used and, if the audience is likely to challenge the validity of the content, explain why.

Employee Section: Are there aspects of your job that you would like to be covered more fully or in more detail? Please outline.

Immediate Supervisor's Comments:

Out-of-scope Manager's Comments:

## JOB EVALUATION DECISION FORM

<b>WORKING TITLE:</b>	<b>CLASSIFICATION LEVEL:</b>
<b>LOCATION:</b>	<b>DEPARTMENT:</b>
<b>INCUMBENT'S NAME:</b>	<b>POSITION #:</b>

<b>REASON FOR REVIEW:</b>	<input type="radio"/> <b>New Job</b>	<input type="radio"/> <b>Six-month Review If New Job</b>	<input type="radio"/> <b>Changes to Existing Job</b>	<input type="radio"/> <b>JJEC Maintenance Review</b>
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<b>JOB RATING</b>										
SUBFACTORS	1A	1B	2A	2B	3	4	5	6	7	8
<b>DEGREE LEVEL</b>										
<b>POINTS</b>										
<b>TOTAL POINTS:</b>										

<b>RATING RESULTS:</b>	<input type="radio"/> <b>No Change</b>	<input type="radio"/> <b>Upgraded</b>	<input type="radio"/> <b>Downgraded</b>
<b>New Working Title:</b>			
<b>Retroactive Date:</b>			

<b>COMMENTS:</b>

*NOTE: If the incumbent(s) disagree(s) with the established Rating, an appeal can be initiated by completing the attached Appeal Form and submitting it to the Joint Job Evaluation Committee.  
**Such a request must be received within twenty-one (21) days of the date of receipt of the Job Evaluation Decision Form.** Reasons/rationale for disagreeing with the Rating must be included on the Appeal Form.*

\_\_\_\_\_  
 Management Member, Rating Panel

\_\_\_\_\_  
 Union Member, Rating Panel

\_\_\_\_\_  
 Date:

\_\_\_\_\_  
 Date:

<b>JJEC TO SEND COPIES TO:</b>			
<input type="radio"/> <b>Incumbent(s)</b>	<input type="radio"/> <b>Out-of-Scope Manager</b>	<input type="radio"/> <b>MIDAS</b>	<input type="radio"/> <b>Union</b>
<b>JJEC retains original</b>			

**JOB EVALUATION APPEAL FORM**

Working Title: \_\_\_\_\_ Classification Level: \_\_\_\_\_ Position #: \_\_\_\_\_

Location: \_\_\_\_\_ Department: \_\_\_\_\_

Immediate Supervisor's Name: \_\_\_\_\_

Immediate Supervisor's Job Title: \_\_\_\_\_

**This is to advise that (please circle the appropriate statement):**

**I wish to appeal the following subfactors for the reasons noted below:**

**OR**

**I do not wish to appeal**

\_\_\_\_\_  
Employee Name (Please Print)

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

**PLEASE SEND ORIGINAL TO:**

**JOINT JOB EVALUATION COMMITTEE  
BOX 1300 MOOSE JAW SK S6H 4R2  
FAX: 306-694-3003**

**JJEC TO SEND COPIES TO:**

- JJEC Co-Chairs     Immediate Supervisor     Union     MIDAS  
 Rating Panel     Appeals Secretary

**JJEC retains original**

## APPENDIX D

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**CUPE**

**JOINT UNION-MANAGEMENT APPEAL PANEL**

**APPEAL HEARING PROCESS**

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The following outline of roles, policies and procedures are for the purpose of ensuring the integrity of the job evaluation plan, the integrity of the information presented and to ensure clarity in roles, authorities and responsibilities of persons attending appeal hearings.

### **A. Right To Appeal**

The PS/CUPE Bargaining Agreement states that permanent employees may appeal the classification decision resulting from a request for a classification review to a Joint Union-Management Appeal Panel, called Classification Joint Council.

Notwithstanding the above, an employee hired into a new job (as per Article 6.2 of the Joint Evaluation Maintenance Procedures), may appeal the classification decision if the job is moved downwards as a result of the 6 month review.

### **B. Purpose Of The Appeal Hearing**

To examine, substantiate, authenticate and adjudicate evidence as to whether appealed Subfactor ratings are appropriate, relative to the full intent of the Subfactor degree definitions.

### **C. Composition Of Panel**

For the purpose of review of classification in the CUPE Class Plan, appeal panels shall consist of four (4) members, equally split between union and management. Quorum shall consist of three (3) members subject to the approval of the minority party (either the union or management member) and all occupations must be adjudicated by equal or better female representation. Appeal panel members shall be drawn from members of the JJEC.

### **D. Role Of The Appeal Panel**

1. To uphold the integrity of the job evaluation plan through the adjudication of disputes regarding the assignment of Subfactor ratings to the job assignment. In this regard, management members of the panel **do not** represent, nor advocate for management or the Public Service Commission and the union members **do not** represent, or advocate for the appellant.
2. To question evidence presented to determine if it meets the requirements in the Notes to Raters and the full intent of the degree definition within the Subfactor.
3. Where necessary, to ensure that evidence presented is verified as legitimate duties and responsibilities of the job assignment.
4. To examine evidence in the context of Benchmark rating comparisons by ensuring the full Benchmark content on the appealed Subfactor is examined in relation to the appealed duties and responsibilities and the full intent of the Subfactors.

### **E. Role Of The Joint Job Evaluation Committee (JJEC)**

1. Article 6.4 of the Job Evaluation Maintenance Procedures (JEMP) obligates the JJEC to ascertain the assigned duties and responsibilities of all jobs and evaluate all jobs in the job evaluation plan. Where no position description questionnaires (PDQ) have been submitted, the JJEC has the authority to obtain the information and evaluate jobs in the job evaluation plan.
2. The Rating Panel (RP) is charged with these responsibilities and to ensure equitable judgements in the application of the plan, in order to ensure the plan's integrity. It is the role of the Appeal Panel (AP) to ensure equitable decisions in this regard.
3. In this process, the RP and the AP have the authority to obtain information through questioning and written documentation to substantiate any statements.
4. One or more RP representatives will meet with the employee prior to a hearing being scheduled to review the appellant's rationale for appeal. The RP will review the rationale and provide a final decision in writing, with rationale, to the employee. Any new information provided by the employee after this point in the process will be taken forward to a formal hearing.
5. If the incumbent goes forward to a formal appeal hearing, the RP is required to provide the AP with written rationale as to the basis of the RP's decision regarding the appealed Subfactors. If additional evidence is provided at a hearing, the RP and the AP are charged with the responsibility to ensure such material is valid and, if necessary, substantiated and that it meets the requirements in the Notes to Raters and full intent of the Subfactor degree.

### **F. Role of the Appellant**

1. To contact his/her own witness(es) [no more than two] to invite them to the hearing. At the appeal panel's discretion, additional witnesses may be allowed.
2. To advise the Secretary, Appeal Panels who will be attending the hearing as witness(es).
3. To bring sufficient copies to the hearing of any written evidence for the AP and the RP.
4. To have new information not provided in the position description questionnaire signed and authorized as legitimate duties or authority by his/her out-of-scope manager prior to the hearing.
5. To provide rationale as to why his/her job should be rated higher on a Subfactor by presenting examples of job content that relate to the Subfactor being appealed. NOTE: The appellant can ask someone else (e.g., a fellow employee, union representative, supervisor) except members of the JJEC to present his/her case at the hearing.

### **G. Observers**

1. Observers are not appellants at the specific hearing.
2. An individual may request permission to observe an appeal hearing from the Secretary, Appeal Panels. The Secretary shall advise the appellant and if the appellant is uncomfortable with the observer(s), the Secretary shall cancel the observer(s) attendance at that meeting.
3. The number of observers may be limited at the discretion of the Appeal Panel.
4. Observers cannot participate in any way in any discussion.
5. No observers will be allowed to enter once a hearing has commenced.
6. The Chair shall request that observers leave the appeal if, in any way, their behaviour is inappropriate.

### **H. Authority Of Joint Union-Management Appeal Panel**

1. To recommend confirmation of the subfactor rating, or a higher or lower rating, based upon the authorized PDQ.
2. **There shall be no discussion by appeal panel members with either party prior to the appeal hearing.**
3. Only the appealed subfactors are subject to review.
4. A subfactor rating cannot be adjusted if the duties or responsibilities have been credited in another subfactor as this would represent bias due to double crediting.
5. Consideration can only be given to the duties and responsibilities of the position as of the effective date of the request. Consideration will not be given to subsequent changes that have taken place.
6. AP members shall refrain from making statements, comments, or personal opinions about what level jobs should be evaluated; nor enter into any debate about the meaning or interpretation of the subfactor, prior to excusing the appellant and the RP member.

### **I. Witness' Function**

1. Appellants, the RP, or the Appeal Panel may call witnesses, including the appellant's supervisor, or manager.
2. Witnesses may only answer questions for clarification of job content, or authority. They are not to present a case, nor express their opinion of the rating. Responses are to be individual, without interruption and addressed to the panel.

3. The questions must pertain to facts about which the witnesses have first-hand knowledge. If questions are asked which the witness(es) cannot answer from their own knowledge, they should decline to answer on that basis.

#### **J. Conflict of Interest Guidelines for JJEC Members**

1. Members of the JJEC must exempt themselves from RP's, AP's and Audit where the member could gain, or could be perceived to gain, from the decision. This includes participation in decisions on jobs:
  - (i) in their work unit, e.g., supervisors and the people who report to them;
  - (ii) in their occupational series, as defined by the PSC;
  - (iii) encumbered by family members, or close personal friends;
  - (iv) for which they have declared a bias for or against.

#### **K. Role and Selection of the Chair**

1. The appeal panel shall select the Chair prior to calling the appellants, RP, witnesses and observers, into the hearing room.
2. The Chair will:
  - (i) Call appellants, RSC, witnesses and observers, into the hearing room.
  - (ii) Read the statement of the panel's role and authority.
  - (iii) Ensure everyone is introduced (name, representation). At this time, the Chair will ask the appellant if there is any perceived conflict of interest as defined in Section J. It is too late after the hearing for the appellant to say they think they did not get a fair hearing because someone on the AP was biased against them. It is the AP's decision how to proceed.
  - (iv) Outline the procedures of the hearing.
  - (v) Outline that the basis of the evaluation shall be the statement of duties, examples of work and the authority assigned to the job.
  - (vi) The Chair has authority and shall excuse any person whose behaviour is inappropriate.
  - (vii) The Chair must ensure that the question period does not become a discussion. This is to be question and response, both without interruption.

- (viii) The Chair shall ensure the hearing is run in an expeditious manner and has the authority to move the discussion along in the event that information is repetitious, or not relevant to the subfactor under appeal. The Chair must focus the presentation on information relevant to the subfactor under appeal and may limit the length of discussion on the subfactor and request that the AP take breaks after a certain length of time. During the breaks, the parties are not to discuss the appeal hearing events.
- (ix) In the event that an appeal hearing is running longer than scheduled and the appellants for the next scheduled hearing are waiting outside, the Chair may stop the proceedings and indicate how long the wait might be.

## **L. Procedures for Appeal Hearings**

### 1. Scheduling

- (i) The Secretary, Appeal Panels, shall notify the appellant(s), the Rating Panel and the Appeal Panel regarding date, time and place of the hearing.
- (ii) Once the appellant(s) has agreed to a hearing date, the hearing will proceed on that date unless there is a reasonable reason for postponement (eg. illness, funeral, etc.) If the employee is unable to attend for other reasons, the hearing will proceed and the employee may ask a spokesperson to attend in their place.

### 2. Preliminary

- (i) The Chairperson ensures that everyone is introduced, including observers and witnesses.
- (ii) The Chairperson outlines the role, authority and procedures of the appeal hearing and the authority of the Joint Union-Management Appeal Panel.

### 3. Rules of Evidence

- (i) All written evidence to be presented must be made available at the hearing to all parties. This amounts to approximately 10 copies. Witnesses and observers do not require copies. It is suggested that a page per subfactor is sufficient to explain the rationale.
- (ii) The basis for the evaluation of the position are the assigned duties and responsibilities, as evidenced by:
  - a. Statements of duties, responsibilities and authority on the PDQ, signed by the manager.
  - b. Examples of work in the PDQ.
  - c. New, or additional information presented at a hearing in the form of job content or authority, or examples of work performed. The RP and/or the AP may request verification by requesting such evidence be signed as legitimate duties, responsibilities, or authority by the permanent head or designate.

- (iii) In the event that new information presented at a hearing has not been confirmed by the manager, it may be considered in rendering the decision. However, no decision shall be released if confirmation is required until it is received in writing by the Chair of the Appeal Panel.
- (iv) Words copied from a subfactor definition must be substantiated with examples and are not accepted outright. Similarly, if examples are copied from benchmarks where the job is very different, the out-of-scope manager may be requested to verify that such duties are, in fact, performed.
- (v) In the event of a disagreement over job content at an appeal hearing between the manager and employee that affects the rating of a specific Subfactor, the Appeal Panel will not render a decision on that Subfactor. The Appeal Panel will render a decision only on the other Subfactors under appeal. **It is not the role of the panel to adjudicate disputes of job content.** Once the dispute is resolved, the RP will rate the job and the appellant has the right to continue to the hearing.

#### 4. Presentation Order

- (i) The appellant or advocate presents rationale for one appealed subfactor without interruption. No questions will be asked at this point by any party.
- (ii) In group appeals, the group shall identify a spokesperson who shall make the presentation. In the event the group has appealed more than one subfactor, a different spokesperson for each subfactor will be allowed. For large groups, the group shall select representatives to be present at their appeal.
- (iii) The RP representative then presents the written rationale for the rating of the appealed Subfactor, without interruption.
- (iv) The Chairperson will provide for a question period at the end of both party's presentation. The Appeal Panel, the appellant or their representative or their spokesperson for the group, and the RP representative are the only ones who can ask questions. The purpose of the questioning is to clarify how evidence presented relates to the Subfactor definitions. Responses are to be directed to the panel.

In group appeals, other members of the group shall be asked if they have additional examples to add, until such time as the Appeal Panel feels they have enough information to make a decision. This shall not be in the form of a discussion, but in the form of individual statements to the panel. If the information being presented is repetitious or not relevant to the subfactor, the Chair has the authority to move the discussion on.

- (v) Witnesses may only be questioned regarding job content, or authority of which they have first-hand knowledge. It is the role of the Chair to ensure that witnesses speak only when questioned and that they do not speak to matters other than job content, or authority. There is an expectation that the panel will determine how such witness(es) came to have first-hand knowledge.
- (vi) The Chairperson will ensure that if any further questions are required, they are asked prior to the summary rebuttal.
- (vii) An opportunity for a short summary rebuttal shall be provided to both parties. The RP representative will summarize first, then the appellant. Where there is a group appeal, only one spokesperson shall be given rebuttal opportunity. For group appeals, prior to the rebuttal, a 5 to 10 minute break will occur to allow input to the rebuttal.
- (viii) When an appellant(s) has appealed more than one subfactor, the above process (i) to (vii) shall be repeated for all subfactors appealed.

## 5. Deliberations

- (i) The Appeal Panel will convene separately, after all the Subfactors under appeal have been heard.
- (ii) If the Appeal Panel requires additional information, the Chair shall ensure the information is obtained. If new confirmed information is obtained by the panel after the hearing, both the appellant and the RP member are to be sent a copy so they are aware of all the information the panel will be taking into consideration in making their decision. The forum for collection and distribution of the information will be at the discretion of the panel.
- (iii) The Appeal Panel shall attempt to determine the appropriate rating by consensus and notify the Secretary, Appeal Panel, on the form provided. In the event that consensus is not achievable, the panel shall write a report outlining the basis of the disagreement, based on the relationship of duties and examples to subfactor rationale. The Appeal Panel will send their report to a quorum of JJEC members, in accordance with the Conflict of Interest Guidelines in Article J. If a quorum of JJEC members is not achievable, or they are unable to reach consensus, JJEC shall bring in a Chair from a mutually agreed to list. In making their decision, the quorum of JJEC or the Chair will consider:
  - a) the Rating Panel appeal brief;
  - b) the appellant's rationale and authorized position description questionnaire, as at the effective date of the assignment;
  - c) the report from the Appeal Panel;
  - d) the full intent of the degree definitions within the subfactors;
  - e) the Notes to Raters;
  - f) the Benchmarks
  - g) any new information they may request.

- (iv) In comparing duties and responsibilities to benchmarks, the Appeal Panel, the quorum of JJEC or the Chair shall consider the full content of the Benchmark description for that Subfactor. Comparison to jobs other than the benchmarks in the relevant job evaluation plan are not to be considered.
- (v) Moral or monetary issues are not to be considered.
- (vi) If a rating change is agreed to by consensus, the panel, the quorum of JJEC, or the Chair shall provide the Secretary, Appeal Panels with written rationale in the form of examples, which show how the work is consistent with the full content meaning and intent of the level definitions within the Subfactors, Subfactor definitions and Notes to Raters. (The Ratings Panel brief is the rationale for unchanged decisions).
- (vii) No decision shall be released except to the Secretary, Appeal Panel, by panel members, the quorum of JJEC or the Chair verbally, or in writing. Outcomes shall be released only by the Secretary of the Appeal Panel as directed by the JJEC.
- (viii) Appeal Panel decisions are subject to audit by a quorum of JJEC members in accordance with the Conflict of Interest Guidelines in Article J. If audit shows the rating is in error, the job shall be re-evaluated by the JJEC.
- (ix) Rating decisions of the JJEC or the Chair, if made within the meaning and intent of subfactors, are final and binding. Such decisions are also final and binding on subsequent incumbents in the same job where there has been no change of duties or responsibilities.

6. Payment of Members

- (i) The employer shall provide leave of absence with pay to union members on the JJEC.
- (ii) The Chair called in to resolve rating disputes, if in the employ of the government, shall be granted leave of absence with pay. If not in the employ of the government, the remuneration shall be equally shared by the parties.
- (iii) The union shall be responsible for the travel and sustenance expenses of its representatives.

**JOB EVALUATION RATING FORM**

<b>Raters:</b>	<b>Position No.(s)</b>
<b>Date:</b>	<b>Employee(s):</b>
<b>Working Title:</b>	

<b>SUBFACTOR</b>	<b>SUBFACTOR RATING</b>	<b>RATIONALE</b>
1A. Knowledge		
1B. Experience		
2A. Problem Solving		
2B. Responsibility for People and Assets		
6. Supervision Of Others		
7. Interaction		

**SUBFACTOR**

## 3. Mental Effort Rating:

	Calculations				Rationale
	Hours	% of Work Week	X	= Points	
Level 3			x 3/3		
Level 2			x 2/3		
Level 1			x 1/3		
TOTAL					

## 4. Physical Activity Rating:

	Calculations				Rationale
	Hours	% of Work Week	X	= Points	
Level 3			x 3/3		
Level 2			x 2/3		
Level 1			x 1/3		
TOTAL					

## 5. Dexterity Rating:

	Calculations				Rationale
	Hours	% of Work Week	X	= Points	
Level 3			x 3/3		
Level 2			x 2/3		
Level 1			x 1/3		
TOTAL					

## 8. Disagreeable Conditions Rating:

	Calculations				Rationale
	Hours	% of Work Week	X	= Points	
Level 4			x 4/4		
Level 3			x 3/4		
Level 2			x 2/4		
Level 1			x 1/4		
TOTAL					