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As required by the *Pay Equity Act*, the SES/U has four overall criteria or factors:

1. Skill

2. Effort

3. Responsibility

4. Working Conditions.

Each of the sub-factors was assigned a weight:

The weights for each sub-factor are set out below as a % by each sub-factor:

Each of the above four factors has several “sub-factors”, for a total of 17. Each of the sub-factors was divided into ascending levels with each level assigned points:

**Skill:**

Previous Education (11%);

Previous Experience (11%);

Interaction Skills (8%);

Movement Skills (6%);

Decision Making (11%);

**Responsibility:**

Responsibility for Information (9%);

Responsibility for Materials, Equipment and/or Outcomes(9%);

Responsibility for the Safety of Others(3%);

Financial Responsibility(8%);

Responsibility to Manage or Direct Others(8%);

**Effort:**

Mental Effort(5%);

Physical Effort(4%)

**Working Conditions**

Temperature, Noise and other Environmental Conditions(1%);

Hazards(2%);

Stress(2%);

Work Interruptions and Distractions (1%);

Social Disruption Required by Work Schedule(1%).

# SK1 PREVIOUS EDUCATION

**=======================**

* Consider the level of education and/or training required in the job.
* Skill acquired through related paid or unpaid work experience/training should be considered as equivalents to formal educational requirements in all levels.

|  |  |
| --- | --- |
| SOME HIGH SCHOOL ---------------------------------------------------------------------------------------------------- | 10 |
| * The job requires basic reading, writing and numeracy skills |  |
| COMPLETED HIGH SCHOOL ------------------------------------------------------------------------------------------ | 15 |
| * More advanced reading, writing and numeracy skills, * including the ability to follow more complicated written instructions and/or training or technical skills |  |
| COMPLETED ONTARIO COLLEGE CERTIFICATE OR EQUIVALENT--------------------------------------  Typical duration to achieve this credential is 2 academic semesters (1 year) | 20 |
|  |  |
| COMPLETED ONTARIO COLLEGE DIPLOMA OR EQUIVALENT -------------------------------------------Typical duration to achieve this credential is 4 academic semesters (2 years) | 25 |
|  |  |
| COMPLETED ONTARIO COLLEGE ADVANCED DIPLOMA OR EQUIVALENT --------------------------  Typical duration to achieve this credential is 6 academic semesters (3 years) | 30 |
|  |  |
| BACHELOR’S DEGREE -------------------------------------------------------------------------------------------------- | 35 |
|  |  |
| BACHELOR’S DEGREE PLUS POST GRADUATE SPECIALIZATION/ PROFESSIONAL DESIGNATION/CERTIFICATION -------------------------------------------------------------------------------------- | 40 |
|  |  |
| MASTER’S DEGREE -------------------------------------------------------- --------------------------------------------- | 45 |
|  |  |
| Ph.D. or DOCTORATE --------------------------------------------------------------------------------------------------- | 50 |
|  |  |

# SK2 PREVIOUS EXPERIENCE

**=========================**

Consider the previous experience required for an individual to assume the responsibilities of the job.

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| --- | --- |
| NO PREVIOUS EXPERIENCE – ENTRY LEVEL ------------------------------------------------------------------ | 10 |
|  |  |
| SOME EXPERIENCE (LESS THAN ONE YEAR) ------------------------------------------------------------------ | 15 |
|  |  |
| MINIMUM ONE YEAR EXPERIENCE --------------------------------------------------------------------------------- | 20 |
|  |  |
| MINIMUM TWO YEARS EXPERIENCE ------------------------------------------------------------------------------ | 25 |
|  |  |
| MINIMUM THREE YEARS EXPERIENCE --------------------------------------------------------------------------- | 30 |
|  |  |
| MINIMUM FOUR YEARS EXPERIENCE ---------------------------------------------------------------------------- | 35 |
|  |  |
| MINIMUM FIVE YEARS EXPERIENCE ------------------------------------------------------------------------------- | 40 |
|  |  |
| SIX TO SEVEN YEARS EXPERIENCE ------------------------------------------------------------------------------- | 45 |
|  |  |
| EIGHT YEARS OR MORE EXPERIENCE---------------------------------------------------------------------------- | 50 |
|  |  |

**SK3 INTERACTION SKILLS**

**=======================**

* Consider the requirement to communicate and interact with other people. This includes:
  + working co-operatively,
  + co-ordinating with others,
  + interacting with people of diverse backgrounds and interests
  + both within and
  + beyond the university community, and
  + the ability to work as a member of a team.
  + Consider the frequency and necessity of interaction, as well as
  + the level of difficulty and the skill required.

|  |  |
| --- | --- |
| FEW ROUTINE CONTACT WITH OTHERS --------------------------------------------------- | 10 |
| * **works alone with little contact with others;** * **communication is mainly oral;** * **incidental contacts;** * **receives work instruction.** |  |
| (I) LIMITED NUMBER OF ROUTINE CONTACTS ------------------------------------------- | 15 |
| * **routine interaction with others and** * **uses problem solving skills;** * **exchanges information;** * **minimal contact with the public.** |  |
| (II) LIMITED NUMBER OF ROUTINE CONTACTS ------------------------------------------ | 20 |
| * **routine interaction with other employees;** * **uses problem solving and persuasion skills to encourage co-operation and agreement;** * **works collaboratively;** * **may be first point of contact,** * **may orient new staff/students;** * **provides routine information.**   Distinction from Rating 15:   * routine interaction with other employees (versus merely others) * problem solving and persuasion to encourage co-operation and agreement * works collaboratively * may be first point of contact/orientation (versus minimal contact with public) * provides routine information |  |
| REGULAR CONTACTS ----------------------------------------------------------------------------- | 25 |
| * **contacts are largely predictable and routine** * **but may involve** * **co-ordination,** * **informal negotiation and/or** * **discussion --- to encourage co-operation where there is disagreement.** * **Fosters positive relationships and sometimes responds to complaints.** * **Interaction with employees and/or students/clients of diverse background or interests. For example:** * **co-ordinates scheduling,** * **resolves technical/administrative matters,** * **listens actively to people who may be upset,** * **resolves minor complaints,** * **provides detailed explanations,** * **demonstrates procedures.**   Distinctions from Rating 20:   * interactions largely predictable and routine (versus merely routine) * may involve addressing disagreements through co-ordination, informal negotiation, or discussion (with the aim of encouraging cooperation) * Nature of these interactions addressing disagreements conditioned by examples(which are likely characterized as “personal complaints” and which are never in a public forum – see below). |  |
| LARGE NUMBER OF REGULAR CONTACTS ----------------------------------------------- | 30 |
| * **interacts with employees and/or students/clients encompassing diversity of background;** * **sometimes uses informal negotiation skills to secure co-operation from a wide range of people who may be upset or vulnerable;** * **probing for information to establish needs or respond to requests;** * **responds to complaints;** * **resolves non-personal complaints;** * **fosters positive relations and manages a range of relationships;** * **interactions may occasionally take place in a public forum.** * **For example:** * **program promotion,** * **screening for referral to other services,** * **advising,** * **training,** * **interpreting policy to others**   Distinctions from Rating 25:   * Uses informal negotiation skills to secure co-operation of wide-range of persons upset or vulnerable. * Probing for information (versus listening actively and providing detailed explanations, etc.) * Responds to complaints (less than frequently [see below]) * Resolves “non-personal” complaints * Fosters positive relations * Manages a range of relationships * Interactions may occasionally take place in a public forum (not regularly in public – see below) |  |
| LARGE NUMBER OF CONTACTS--------------------------------------------------------------- | 35 |
| * **interacts with employees and/or students/clients encompassing diversity of background;** * **often uses informal negotiation skills to secure co-operation from a wide range of people who may be upset or vulnerable;** * **frequently responds to complaints;** * **resolves minor interpersonal complaints and/or develops relationships with people whose co-operation is important to the university;** * **interactions regularly take place in a public forum.** * **For example:** * **marketing,** * **recruiting,** * **making referrals,** * **assessing competencies or suitability,** * **formal instruction such as educational workshops or conference presentations,** * **career counselling,** * **financial or academic counselling.**   Distinctions from Rating 30:   * frequently responds to complaints * resolves minor interpersonal complaints (versus non-personal or personal complaints above) * develops relationships with people whose cooperation is important to the university * interactions regularly take place in public forum. (versus may occasionally take place in public forum [see above] and will not involve the media [see below]) |  |
| (I) LARGE NUMBER OF VARIED CONTACTS ----------------------------------------------- | 40 |
| * **investigates and/or resolves serious interpersonal complaints or problems and** * **negotiates with and provides counsel to a wide range of people who may be upset or vulnerable;** * **ongoing contacts with people whose co-operation is important to the university;** * **interactions regularly take place in a public forum and may involve the media.** * **For example:** * **assesses physical or mental condition,** * **advanced career counselling,** * **health counselling.**   Distinctions from Rating 35:   * Both investigates and/or resolves serious interpersonal complaints (versus responding to minor interpersonal complaints) * Negotiates and provides counsel to a wide-range of persons (versus informally negotiates to secure cooperation) * On-going contacts with people whose co-operation is important to the university * Interactions (i) regularly take place in public forum and (ii) may involve the media. |  |
| (II) LARGE NUMBER OF VARIED CONTACTS ---------------------------------------------- | 45 |
| * **uses a wide range of interpersonal and persuasive skills to secure the compliance of diverse individuals and groups;** * **responds to crisis;** * **ongoing relationships with people whose co-operation is important to the university;** * **interactions often take place in a public forum and involve media relations.** * **For example:** * **manages donor relations,** * **provides advanced or ongoing health counselling.**   Distinction from Rating 40:   * Responds to crises (versus dealing with serious interpersonal complaints or persons who are upset or vulnerable) * (i) uses a wide range of interpersonal/persuasive skills (ii) to secure compliance (iii) of diverse individuals and groups. (limited reference to activities similar to managing donor relations, etc.) * Interactions (i) often take place in public forum and (ii) involve media relations (rather than may involve the media) |  |
| (III) LARGE NUMBER OF VARIED CONTACTS --------------------------------------------- | 50 |
| * **contacts are highly varied and unpredictable and require a high level of** * **co-ordination,** * **discussion, or** * **negotiation;** * **intervention in situations that are highly emotional or volatile;** * **represent the mission and goals of the university in public including with the media.** * **For example:** * **stewardship of donor relations,** * **crisis counselling,** * **psychotherapy,** * **critical incident intervention.**   Distinctions from Rating 50:   * Contacts are highly varied and unpredictable (versus largely predictable, as was provided at Rating 25, which was never qualified until this rating) * Requires a high level of co-ordination, discussion, or negotiation * Intervention in situations that are highly emotional or volatile * Represent the mission and goals of the university in public (including with the media) |  |

### SK4 MOVEMENT SKILLS

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Consider the degree of dexterity, muscular coordination and precision required to perform the job and also whether the element of speed is a primary or secondary consideration.

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| **Description** | **No requirements  for speed** | **Requirements for speed** |
| * The job requires a *low* level of muscular coordination and/or * manual dexterity where precision is not essential | 10 | 10 |
| * The job requires a *moderate* level of muscular coordination and/or * manual dexterity where precision is essential. | 20 | 30 |
| * The job requires a *high l*evel of muscular coordination and/or * manual dexterity where precision is essential. | 30 | 40 |
| * The job requires a *very high* level of muscular coordination and/or * manual dexterity to execute *very precise and synchronized* movements | 40 | 50 |

Note to Raters

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| --- | --- | --- | --- |
| **Level** | **No requirement for speed** | **Level** | **Requirement for Speed** |
| 10 | * Stuffing envelopes; shelving books | 10 |  |
| 20 | * Use of computer to manipulate or retrieve data; * Use of keypad/wand/keyboard to enter data into fixed fields or to access information (e.g. Email, notes, web-browsing) | 30 | * Use of centrifuge; * Setting up lab equipment; * Pipetting; * Setting up dental stations |
| 30 | * Full keyboard use such as for processing a  variety of documents or data input where corrections are permitted after the fact; * Assembling and disassembling computer hardware; * Minor equipment repair; * AV setup | 40 | * Precise keyboard/keypad use where possibility for correction is minimal (e.g. production-oriented document production or data entry) |

|  |  |  |  |
| --- | --- | --- | --- |
| **Level** | **No requirement for speed** | **Level** | **Requirement for Speed** |
| 40 | * Accurate mixing of chemicals; * preparing sample for light microscopy; * manual calibration of equipment; work to fine tolerances (e.g. mechanical design, fabrication or repair); * precise placement of graphic, photographic or cartographic objects at the pixel level; * assembling of circuit boards; * performing non-surgical procedures on lab animals; * athletic demos; * performing physical therapy techniques; * giving injections; * operating lathe or oscilloscope; * gas chromatograph | 50 | * Preparing sample for electron microscopy; * Glassblowing; Animal surgery |

**SK5 DECISION-MAKING**

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* Consider the kind of decision-making required by the position and the independence and judgement required to make decisions.
* Consider also the need to facilitate the effective and equitable application of university policy through decision-making.

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| --- | --- |
| FEW, SIMPLE DECISIONS ---------------------------------------------------------------------------------------------- | 10 |
| * **simple decisions in carrying out tasks.** * **little scope for variation or deviation;** * **ability to follow rules and procedural instructions;** * **decisions ordinarily directly related to the job** |  |
| SIMPLE DECISIONS ------------------------------------------------------------------------------------------------------ | 15 |
| * **simple decisions related to the job with minimal need to refer to higher levels,** * **decisions have a limited impact on activities within a department.** * **decisions involve matching problems to a set of established solutions,** * **e.g. identifying missing or mismatched information in applications, and deciding to call the applicant.**   Distinctions from Rating 10:   * simple decisions with * minor scope for variation in decision making and * minimal need to refer to higher levels. * decisions involve matching problems to set of established solutions. |  |
| ROUTINE DECISIONS ---------------------------------------------------------------------------------------------------- | 20 |
| * **routine decisions related to the job and following expected patterns;** * **rules and procedures are applied to a range of similar situations.** * **decisions involve applying established standards,** * **e.g. cataloguing rules, or** * **using checklists to assess such things as membership eligibility.**   Distinctions from Rating 15:   * routine decisions following expected patterns * applying rules/procedures/standards to similar/routine situations |  |
| DECISIONS INVOLVING UNEXPECTED EVENTS --------------------------------------------------------------- | 25 |
| * **routine decisions and/or occasional decisions in response to unexpected events;** * **decisions may involve introducing variations to established practices and procedures requiring problem solving ability.** * **decisions involve minor trouble-shooting of e.g. unexpected hardware/software problems;** * **prioritising workflow;** * **dealing with routine enquiries e.g. on accounts payable, with departments and vendors, verifying purchasing quotes;** * **interpreting guidelines on e.g. reimbursement of expenses**   Distinctions from Rating 20:   * occasional decisions in response to unexpected events (as opposed to strictly routine decisions) * may involve introducing variations to established practices/procedures * requiring problem solving ability (rather than simply applying practices/procedures) * decisions involve minor trouble-shooting * dealing with routine enquiries * interpreting guidelines |  |
| DECISIONS ABOUT OCCASIONAL UNUSUAL AND UNEXPECTED EVENTS -------------------------- | 30 |
| * **routine decisions and occasional decisions in response to unusual and unexpected events;** * **routine and non-routine decisions that require application & interpretation of rules, guidelines and/or procedures using some independent judgement, and requiring analytical skills.** * **For example:** * **creation of customised lab apparatus;** * **organising conferences/events;** * **interpreting data requiring initiative and independent judgement such as** * **making exceptional admissions decisions or** * **modifying experimental protocols.**   Distinctions from Rating 25:   * occasional decisions in response to unusual events (in addition to unexpected events) * routine/non-routine decisions involving * interpretation of rules (as opposed to variations on established practices) * using some independent judgment * requiring analytical skills |  |
| DECISIONS ABOUT FREQUENT UNEXPECTED EVENTS ---------------------------------------------------- | 35 |
| * **routine decisions and in response to frequent unexpected events with limited access to higher levels and requiring the application and interpretation of policies.** * **Job may require independent judgement and skill to plan and organize more effectively.** * **For example:** * **plans components of projects/programs;** * **plans workflow for a group;** * **identifies best approach/strategy for donor relations;** * **selects commissions or outside contracts for the facility;** * **ensures compliance with regulations affecting e.g. certification or status of the University or a facility.**   Distinctions from Rating 30:   * frequent decisions in response to unexpected events (as opposed to occasional decisions for unexpected events) * with limited access to higher levels * may require * independent judgement (as opposed to some independent judgment) and * skill to plan and organize more effectively |  |
| (I) COMPLEX DECISIONS ----------------------------------------------------------------------------------------------- | 40 |
| * **job requires independent and significant judgement and decision-making skills.** * **Significant input into local policy,** * **interprets policy in decision-making,** * **decisions have serious impact.** * **For example:** * **plans and develops programs independently,** * **resolves problems referred by other specialists,** * **makes recommendations about suitability of major new equipment or software systems.**   Distinctions from Rating 35:   * requires * significant independent judgement (as opposed to mere independent judgment) and * significant decision-making skills * significant input into local policy * interprets policy in decision-making * decisions have serious impact. (as opposed to limited impact on activities within a department, as set out at Rating 15 and unchanged to present Rating 40) |  |
| (II) COMPLEX DECISIONS ---------------------------------------------------------------------------------------------- | 45 |
| * **job requires independent and significant decision-making skills;** * **resolves complex problems referred by others;** * **frequent requirement to make independent and prompt decisions based on broad policies or guidelines;** * **decisions are referred to in future interpretation questions.** * **Impact is broad with long-term consequences.** * **For example:** * **develops new system elements,** * **analyses operational requirements to implement new hardware/software systems,** * **provides significant input into policy affecting a function within the University;** * **defines requirements and scope of complex projects.**   Distinctions from Rating 40:   * resolves complex problems referred by others * frequent requirement to make independent and prompt decisions based on broad policies or guidelines; * decisions are referred to in future interpretation questions. * Impact is broad with long-term consequences |  |
| MANY, COMPLEX POLICY DECISIONS ---------------------------------------------------------------------------- | 50 |
| * **continuous requirement for rapid and flexible decision-making.** * **Decisions are highly complex and** * **may be made without the benefit of formal policy, and** * **may be relied upon as precedents.** * **Decisions will have far reaching impact on the University.** * **Decision-making requires strategic long- and short-term planning of complex operations, projects, programs or systems;** * **creating innovative hypotheses or solutions.**   Distinctions from Rating 45:   * continuous requirement for rapid and flexible decision-making * Decisions are highly complex and * may be made without the benefit of formal policy (as opposed to using broad policies) * may be relied upon as precedents (as opposed to merely being referred to for interpretation) * Decisions have far reaching impact on the University (as opposed to merely being broad with long term consequences) * requires strategic long- and short-term planning of complex operations, projects, programs or systems * creating innovative hypotheses or solutions. |  |

**RE1 RESPONSIBILITY FOR INFORMATION**

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* Consider the responsibility for collecting and passing on information, written or oral, to others, including higher levels of authority, other departments, faculties, colleges, divisions, students and members of the public.
* Consider the complexity, sensitivity and significance of information.

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| --- | --- |
| LITTLE RESPONSIBILITY FOR INFORMATION ------------------------------------------------------------------ | 10 |
| * **limited information of minimal importance** |  |
| LIMITED RESPONSIBILITY FOR INFORMATION ---------------------------------------------------------------- | 15 |
| * **collecting and passing on a limited amount of information** |  |
| (I) SOME RESPONSIBILITY FOR INFORMATION ---------------------------------------------------------------- | 20 |
| * **collecting and passing on information** * **e.g. maintaining records, matching information, and providing routine information**   Distinction from Rating 15:   * not a limited amount of information |  |
| (II) SOME RESPONSIBILITY FOR INFORMATION --------------------------------------------------------------- | 25 |
| * **collecting and passing on information** * **e.g. generating reports, disseminating information, verifying information, formatting documents**   Distinctions from Rating 20:   * generating reports rather than maintaining records/information (does not involve original descriptive work on reports/records [see below]) * formatting documents |  |
| (I) SIGNIFICANT RESPONSIBILITY FOR INFORMATION ------------------------------------------------------ | 30 |
| * **information is of importance** * **e.g. editing content, original descriptive cataloguing.** * **information may be sensitive or confidential**   Distinctions from Rating 25:   * editing content rather than formatting documents * original descriptive cataloguing rather generating reports. * may be sensitive or confidential * will not be published [see below] |  |
| (II) SIGNIFICANT RESPONSIBILITY FOR INFORMATION ----------------------------------------------------- | 35 |
| * **Information is of importance** * **e.g. produces marketing and promotional/outreach materials.** * **Information may be sensitive/confidential and** * **may be published.**   Distinctions from Rating 30:   * produces marketing content/materials rather than editing content * may be published |  |
| (III) SIGNIFICANT RESPONSIBILITY FOR INFORMATION ---------------------------------------------------- | 40 |
| * **Information is complex and/or technical,** * **e.g. grants, statistical information, financial statements, donor reports, complex design schematics.** * **It may be published.** * **Much sensitive/confidential.**   Distinctions from Rating 35:   * complex/technical information. * much info is sensitive/confidential (rather than may be sensitive/confidential) |  |
| (IV) SIGNIFICANT RESPONSIBILITY FOR INFORMATION ------------------------------------------------ -- | 45 |
| * **Information is highly complex and/or highly technical,** * **often sensitive/confidential.**   Distinctions from Rating 40:   * highly complex/technical information * often sensitive (rather than much sensitive/confidential) |  |
| SIGNIFICANT RESPONSIBILITY FOR INFORMATION; MUCH COMPLEX/TECHNICAL AND CONFIDENTIAL ------------------------------------------------------------------------------------------------------------- | 50 |
| * **Information is highly complex and/or highly technical, and** * **sensitive/confidential.**   Distinction from Rating 45:   * information must be very often or nearly always sensitive/confidential (rather often sensitive/confidential) |  |

**RE2 RESPONSIBILITY FOR MATERIALS, EQUIPMENT AND/OR OUTCOMES**

**=====================================================================**

* To measure the responsibility for materials, equipment, and/or outcomes,
* consider the cost and/or impact if an error is made.
* consider the scope of responsibility for the use and allocation of resources and
* consider the impact of errors including:
* the impact on the effective operation of teaching and research facilities;
* the successful conduct of projects and specific research programs;
* the efficiency and effectiveness of administrative, technical, or mechanical functions/processes which support the goals and objectives of the University.

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| LITTLE RESPONSIBILITY FOR MATERIALS, EQUIPMENT AND/OR OUTCOMES ------------------- | 10 |
| * **responsible for the use of resources within the performance of own position;** * **cost of errors is not significant** |  |
| (I) LIMITED RESPONSIBILITY FOR MATERIALS, EQUIPMENT AND/OR OUTCOMES ------------- | 15 |
| * **responsible primarily for the use of resources within the performance of own position;** * **may affect activities and work flow of co-workers;** * **cost of errors is of little significance**   Distinctions from Rating 10:   * errors may affect workflow of co-workers. |  |
| (II) LIMITED RESPONSIBILITY FOR MATERIALS, EQUIPMENT AND/OR OUTCOMES ------------ | 20 |
| * **responsible primarily for the use of resources as it affects the activities and work flow of co-workers;** * **cost of errors** * **is of some significance to the department, project or research program and** * **may have a short-term effect on individuals, cause short delays or workflow problems,** * **ensures that equipment is in operating order and/or arranges for equipment to be fixed.**   Distinctions from Rating 15:   * responsible primarily for use of resources affecting activities/workflow of co-workers. * cost of errors * of some significance to the department/project/program (rather than little significance) * may cause short-term effects/delays/workflow problems * ensure that equipment * is in operating order, and/or * arranges repairs. |  |
| (I) SIGNIFICANT RESPONSIBILITY FOR MATERIALS, EQUIPMENT AND/OR OUTCOMES ------ | 25 |
| * **responsible for the use of resources as it affects the activities and work flow in a department or for a major project or major research program;** * **cost of errors** * **is significant to the department or major project or major research program and** * **may have** * **significant short-term effect on individuals or** * **have indirect impact on research projects.**   Distinctions from Rating 20:   * responsible for use of resources affecting activities/workflow * in a department (rather than merely co-workers) * for a major project/research program * cost of errors * significant to the department/project/program (rather than some significance) * may cause * significant short-term effects on individuals * indirect impact on research projects |  |
| (II) SIGNIFICANT RESPONSIBILITY FOR MATERIALS, EQUIPMENT AND/OR OUTCOMES ----- | 30 |
| * **responsible for the use of resources as it affects the activities and work flow in a department or for a major project or major research program;** * **cost of errors** * **is highly significant to a department or major project or major research program, and** * **has a direct impact on e.g.** * **a single research project, or** * **a short-term effect on groups, or** * **academic or financial impact on students.**   Distinctions from Rating 25:   * cost of errors * is highly significant to the department or major project/program (rather than merely some significance) * has a direct impact (rather than may have indirect impact) on, e.g.: * a single research project, or * a short-term effect on groups, or * academic or financial impact on students. |  |
| (I) MUCH RESPONSIBILITY FOR MATERIALS, EQUIPMENT AND/OR OUTCOMES ---------------- | 35 |
| responsible for the use of resources as it affects the activities and workflow of a faculty, a college, the library, administration/operations division or any other major division of the University,for example,maintaining lab research equipment;cost of errors is significant to a faculty, college or division;delays or flaws affecting a research project or teaching;long term effect on groups or individuals. Distinctions from Rating 30:   * responsible for resources affecting activities and work flow of a faculty, college, the library, administration division or any other major division (rather than merely a department or major project) * costs of errors is significant to a faculty/college/division (rather than a department) * long term affect on groups/individuals |  |
| (II) MUCH RESPONSIBILITY FOR MATERIALS, EQUIPMENT AND/OR OUTCOMES ---------------- | 40 |
| * **responsible for the use of resources as it affects the activities and workflow of a faculty, a college, the library, administration/operations division or any other major division of the University;** * **responsible for large scale purchases for a department or faculty;** * **cost of errors is highly significant to a faculty, college or division and may be significant to the University.** * **Errors have an impact on University relations/reputation;** * **errors have a long-term effect on the department/division and loss of credibility to the department/division.**   Distinctions from Rating 35:   * responsible for large scale purchases for department or faculty * costs of errors is highly significant to a faculty/college/division (rather than merely significant) * errors impact university relations/reputation * errors have/cause * long-term impact on department/divisions (rather than on groups/individuals) * the loss of credibility to department/division |  |
| (III) MUCH RESPONSIBILITY FOR MATERIALS, EQUIPMENT AND/OR OUTCOMES ---------------- | 45 |
| * **responsible for the use of resources as it affects a major University-wide function;** * **cost of errors are significant to the university;** * **high impact on** * **student health or well-being,** * **loss of department’s credibility;** * **long-term negative impact on the University;** * **a single University-wide system.**   Distinctions from Rating 40:   * responsible for resources affecting major university-wide function (rather than to a faculty/college/major division) * costs of errors significant to university (rather than highly significant to faculty/college/major division) * high impact on * student health or well-being, * loss of department’s credibility; (rather than merely long-term) * long-term negative impact on the University; (rather than merely on a department) * a single University-wide system. |  |
| GREAT RESPONSIBILITY FOR MATERIALS, EQUIPMENT AND/OR OUTCOMES ------------------- | 50 |
| * **responsible for the use of resources as it affects critical University-wide function(s);** * **cost of errors to the university is extremely high and has a long-term impact on a major University system.**   Distinctions from Rating 45:   * responsible for resources affecting critical University-wide functions(s) (rather than merely a singular possible function) * costs or errors * is extremely high (rather than significant) * Long-term impact on a major University system (rather than a single University-wide system) |  |

**RE3 RESPONSIBILITY FOR THE SAFETY OF OTHERS**

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Consider the degree of care required by the job to prevent physical or emotional injury or harm to co-workers, students and/or the public

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| --- | --- |
| LITTLE CARE REQUIRED TO PREVENT PHYSICAL OR EMOTIONAL INJURY OR HARM TO OTHERS ------------------------------------------------------------------------------------------------------------------ | 10 |
| * **nature of work performed requires minimal care to avoid injury or harm to others.** |  |
| SOME CARE REQUIRED TO PREVENT PHYSICAL OR EMOTIONAL INJURY OR HARM TO OTHERS ----------------------------------------------------------------------------------------------------------------- | 15 |
| * **potential impact in immediate work area** |  |
| CARE REQUIRED TO PREVENT PHYSICAL OR EMOTIONAL INJURY OR HARM TO OTHERS | 20 |
| * **careful attention to occupational safety precautions is required** |  |
| (I) SIGNIFICANT CARE TO PREVENT PHYSICAL OR EMOTIONAL INJURY OR HARM TO OTHERS ---------------------------------------------------------------------------------------------------------------- | 25 |
| * **significant care required during the work period;** * **potential impact in immediate work area**   Distinction from Rating 20:   * significant care required (rather than careful attention) |  |
| (II) SIGNIFICANT CARE TO PREVENT PHYSICAL OR EMOTIONAL INJURY OR HARM TO OTHERS ---------------------------------------------------------------------------------------------------------------- | 30 |
| * **significant care and attention is required;** * **ensuring compliance and providing training/ instruction;** * **potential impact beyond immediate work area**   Distinction from Rating 25:   * significant care and attention required (rather than merely significant care) * ensuring compliance * providing training/instruction * potential impact beyond work area |  |
| (I) MUCH CARE REQUIRED TO PREVENT PHYSICAL OR EMOTIONAL INJURY OR HARM TO OTHERS -------------------------------------------------------------------------------------------------------------------- | 35 |
| * **sustained care and attention is required during the work period;** * **impact extends beyond immediate work area,**   Distinctions from Rating 30:   * sustained care and attention required (rather than significant care and attention) * impact extends beyond work area (rather than potential impact beyond work area) |  |
| (II) MUCH CARE REQUIRED TO PREVENT PHYSICAL OR EMOTIONAL INJURY OR HARM TO OTHERS --------------------------------------------------------------------------------------------------------------------- | 40 |
| * **sustained care and attention is required during the work period;** * **impact extends beyond immediate work area;** * **responsible for things that may cut, crush, blind or burn.**     Distinctions from Rating 35:   * responsible for things that may cut, crush, blind or burn. |  |
| (I) EXTREME CARE REQUIRED TO PREVENT PHYSICAL OR EMOTIONAL INJURY OR HARM TO OTHERS ----------------------------------------------------------------------------------------------------------------- | 45 |
| * **close attention is required to avoid serious injury or harm to others**   Distinctions from 40:   * + close attention required (rather than sustained attention)   + risk of serious injury or harm to others |  |
| (II) EXTREME CARE REQUIRED TO PREVENT PHYSICAL OR EMOTIONAL INJURY OR HARM TO OTHERS ---------------------------------------------------------------------------------------------------------------- | 50 |
| * **sustained attention is required to prevent serious injury or harm to others;** * **responsible for containing hazards such as biohazards, radioactive materials, communicable infections, gases, chemicals, high voltage equipment.**   Distinctions from Rating 45:   * sustained attention required to avoid serious injury to others (rather than close attention) |  |

**RE4 FINANCIAL RESPONSIBILITY**

**=============================**

* Consider the requirement to deal with money, either handling it, or in terms of
* responsibility for budgets or decision making about spending.

|  |  |
| --- | --- |
| MINIMAL FINANCIAL RESPONSIBILITIES ------------------------------------------------------------------------- | 10 |
| * **little or no handling of money and no decisions about budgets and/or spending** |  |
| LIMITED INVOLVEMENT IN FINANCES ----------------------------------------------------------------------------- | 15 |
| * **limited handling of small amounts, such as small petty cash funds or limited responsibility for issuing receipts or handling fees or fines;** * **no independent decisions about budgets or spending.** * **For example:** * **occasional handling of expenses for events,** * **recording or verifying transactions on a single account;** * **no budgeting.**   Distinctions from Rating 10:   * handling petty cash, limited responsibility issuing receipts or handling fees. |  |
| SOME FINANCIAL TRANSACTIONS --------------------------------------------------------------------------------- | 20 |
| * **handling of petty cash and/or fees, fines etc. on a regular basis;** * **some responsibility for recording.** * **For example:** * **discretion to make minor purchases;** * **collaborates on cost estimates;** * **manages petty cash, enters timesheet data;** * **intermittently handles and processes cheques;** * **recording of a few accounts, including payroll**   Distinctions from Rating 15:   * handling petty cash or fees on a regular basis (rather than limited handling) * some responsibility for recording. |  |
| MAINTAINS ACCOUNTS ------------------------------------------------------------------------------------------------- | 25 |
| * **responsible for accounts, transfers and expenditures within established guidelines and cash limits;** * **regular responsibility for reporting and reconciliation.** * **For example:** * **costs shop level projects,** * **records detailed transactions for many accounts at departmental level, including payroll;** * **reconciles accounts;** * **monitors accounts for one’s own program;** * **generates standard financial reports**   Distinctions from Rating 20:   * responsible for account/transfer/expenditures within established guidelines/limits (rather than handling petty cash/fees) * regular responsibility for reporting and reconciliation (rather than some responsibility for recording) |  |
| MAINTAINS DEPARTMENT OPERATING BUDGET ------------------------------------------------------------- | 30 |
| * **monitors department budget for accuracy and completeness;** * **some responsibility for planning expenditures and budgets.** * **For example:** * **tracks and reports on spending;** * **records detailed transactions on many accounts including payroll;** * **reconciles accounts multiple departments;** * **manages a single operating budget for a single unit;** * **applies bookkeeping rules;** * **plans expenditures and budget at departmental level**   Distinctions from Rating 25:   * monitors budget for accuracy and completeness (rather than being responsible for accounts/transfers/expenditures within established guidelines) * some responsibility for planning expenditures/budgets (rather than regularly reporting) |  |
| MAINTAINS COMPLEX BUDGETS ------------------------------------------------------------- ---------------------- | 35 |
| * **responsible for transferring funds and expenditures, within context of an overall plan;** * **makes recommendations about budget allocations, forecasting and planning;** * **budgets with multiple sources of revenue and/or recoveries.** * **For example:** * **costing and/or forecasting/planning spending on major projects;** * **developing tenders and RFPs;** * **managing grants and financial aid;** * **making recommending on purchasing process, vendors and suppliers;** * **manages complex multiple budgets – operating, trust, capital, research grants;** * **generates specialised financial analyses, reports for financial planning.**   Distinctions from Rating 30:   * responsible for transferring funds/expenditures within context of an overall plan (rather than within established guidelines as per Rating 25) * makes recommendations about budget allocations, forecasting and planning. (rather than some responsibility merely for planning) * budgets with multiple sources of revenue |  |
| SIGNIFICANT FINANCIAL RESPONSIBILITY ---------------------------------------------------------------------- | 40 |
| * **financial management of a department, including budget-setting;** * **independent decisions about spending limited by rules and reporting required by the university and external funding providers.** * **Makes effective recommendations on major purchases or financial strategy (e.g. revenue-generating activities);** * **oversight of financial management, analysis and forecasting at the departmental level**   Distinctions from Rating 35:   * financial management of a department, including budget setting (rather than making recommendations about budget) * independent decisions about spending limited by rules and reporting required by university/external funders (rather than transferring funds within context of an overall plan) * makes effective recommendations on major purchases/financial strategy * oversight of departmental financial management |  |
| SIGNIFICANT FINANCIAL RESPONSIBILITY FOR A MAJOR FACULTY/COLLEGE/DIVISION ----- | 45 |
| * **financial management of a major faculty/college/division;** * **independent decisions about spending; and/or** * **financial management of the budgets of complex inter-institutional partnerships.** * **Oversight of financial management, analysis and forecasting beyond the departmental level.**   Distinctions from Rating 40:   * Financial management of major faculty/college/division (rather than department) * Independent decisions about spending (rather than limited by rules and reporting required by university/external funders) * Financial management of budgets of complex inter-institutional partnerships (i.e. between departments) * Oversight beyond the departmental level |  |
| RESPONSIBILITY FOR FINANCIAL DIRECTION ----------------------------------------------------------------- | 50 |
| * **extensive participation in university-wide budgeting decisions;** * **accountable for decisions about overall priorities, allocation and spending.**   Distinctions from Rating 45:   * extension participation in university wide budgeting (rather than for faculty/college/division) * accountable for decision about overall priorities (rather than merely beyond the department level) |  |

**RE5 MANAGE OR DIRECT OTHERS**

**==========================**

* Consider the extent of management responsibilities required by the job.
* Consider (i) *guidance, direction* and/or (ii) *reporting or review* of performance required by the position.
* Consider the responsibility for managing, or directing staff of diverse backgrounds and experience.

|  |  |
| --- | --- |
| MINIMAL RESPONSIBILITY FOR OTHERS ------------------------------------------------------------------------ | 10 |
| * **job may entail occasional directing of others but no direct responsibility;** * **provides new employees/students with a basic orientation to the work area.** |  |
| SOME RESPONSIBILITY FOR OTHERS ---------------------------------------------------------------------------- | 15 |
| * **job may entail occasional directing of others but minimal direct responsibility.** * **occasional requirement to assign/check and schedule work of work-study students;** * **directs work of non-University employees/volunteers in defined activities (not ongoing);** * **provides orientation to new employees/students on working procedures and practices.**   Distinctions from Rating 10:   * + occasional directing of others with minimal direct responsibility (versus no direct responsibility)   + provides orientation on working procedures and practices (versus basic orientation to the work area)   + occasionally assigns/checks and schedules work of work-study student   + may direct work of non-ongoing, non-university employees/volunteers in defined activities. |  |
| (I) MANAGES OR DIRECTS SMALL GROUP IN LIMITED AREA --------------------------------------------- | 20 |
| * **job entails responsibility for the management or direction of a small defined group in limited area.** * **some responsibility for directing the activities of up to 3 ongoing employees; or short-term casuals;** * **assigns and checks work of work-study students;** * **directs work of casual employees in defined activities (not ongoing);** * **selects placement students – no supervision;** * **coaches;** * **serves as a resource to a group or on a function.**   Distinctions from Rating 15:   * + responsibility for management or direction of small defined group in limited area (versus occasional directing with minimal direct responsibility)   + some responsibility for directing activities of up to 3 ongoing employees or short term casuals   + assigns and checks work of work-study students (versus occasionally assigns/checks work)   + directs work of non-ongoing casual employees in defined activities (versus non-ongoing, non-university employees/volunteers)   + selects placement students   + coaches   + serves as a resource to a group or function |  |
| (II) MANAGES OR DIRECTS SMALL GROUP IN LIMITED AREA -------------------------------------------- | 25 |
| * **job entails responsibility for the management or direction of a small group in a limited area with** * **some performance review responsibilities,** * **responsible for scheduling, and/or** * **workflow.** * **for example:** * **full responsibility for directing the activities of a single ongoing employee; or** * **supervises some activities for a small group;** * **supervises longer-term casuals;** * **serves as a resource on specific issues to a group of specialists.**   Distinctions From Rating 20:   * responsibility for management/direction of a small group in a limited area (versus small defined group in Rating 15; * what constitutes a small group in a limited area rests between more than 3 employees [see above] and what constitutes a small department [see below] * Further distinctions arise from the examples, including: * full responsibility for activities of single ongoing employee (versus some responsibility for activities of small group); * OR * supervises longer term casuals (versus non-ongoing casual employees); * serves as a resource on specific issues to group of specialists (versus resource to a group or on a function) |  |
| MANAGES OR DIRECTS SMALL GROUP IN A WIDE RANGE OF RELATED ACTIVITIES ---------- | 30 |
| * **job entails responsibility for the management or direction of a small department or a small number of lower level supervisors.** * **for example:** * **full responsibility for directing the activities of a group all performing a similar function;** * **supervises activities of research assistants;** * **oversees work of a small number of, or short term contractors or contributors;** * **may have input into performance review – not clinical;** * **conducts performance reviews – clinical;** * **supervises the activities of one clinical placement student;** * **serves as an expert resource to a group of professionals in the specialty.**   Distinctions from Rating 25:   * responsibility for management/direction of small department or small number of lower level supervisors (versus small group in a limited area) * Distinctions arising from examples: * full responsibility for directing activities of a group all performing similar function (versus single employee) * supervises research assistants * oversees small number of short term contractors or contributors * conducts clinical performance reviews. * possible input into non-clinical performance reviews * supervises one clinical placement student * Serves as expert resource to a group of professionals in the specialty (versus resource on specific issues to group of specialists) |  |
| MANAGES OR DIRECTS SMALL GROUP IN WIDE RANGE OF ACTIVITIES ---------------------------- | 35 |
| * **job entails responsibility for the management or direction of a small department or a small number of lower level supervisors;** * **responsibility for performance reviews.** * **for example:** * **full responsibility for directing the activities of a group performing varied functions;** * **supervises non bargaining unit employees;** * **oversees work of a large number of, or long term contractors or contributors;** * **has input into performance review;** * **supervises the activities of multiple clinical placement students.**   Distinctions from Rating 30:   * responsible for performance reviews * full responsibility for directing activities of group performing varied functions (versus all performing similar functions) * supervises non-bargaining unit employees * oversees work of large number of long-term contractors or contributors (versus small number of short-term) * has input into performance review (versus may have input into non-clinical review) * supervises multiple clinical placements (versus one clinical placement) |  |
| MANAGES OR DIRECTS MEDIUM-SIZED GROUP WITH A WIDE RANGE OF ACTIVITIES -------- | 40 |
| * **job entails responsibility for managing or directing a department or section and a number of lower-level supervisors.** * **for example:** * **hires and supervises a large number of contract instructors.**   Distinctions from Rating 35:   * responsibility for managing/directing a department or section and a number of lower level supervisors (versus a small department or a small number of lower level supervisors) * may hire and supervise a large number of contract instructors |  |
| MANAGES OR DIRECTS LARGE GROUP WITH WIDE RANGE OF ACTIVITIES ----------------------- | 45 |
| * **job entails responsibility for managing or directing a large department with a significant number of lower level managers/supervisors.** * **for example:** * **full responsibility for directing the activities of multiple groups performing multiple functions;** * **supervises non bargaining unit employees;** * **hires outside the bargaining unit;** * **other HR tasks.**   Distinctions from Rating 40:   * responsibility for managing/directing a large department with a significant number of lower level supervisors (versus a department and a number of lower level supervisors) * supervises non-bargaining unit employees * hires outside the bargaining unit * other HR duties |  |
| MANAGES OR DIRECTS LARGE GROUP WITH COMPLEX ACTIVITIES -------------------------------- | 50 |
| * **job entails the management or direction of:** * **a large department or division with complex operations and** * **many lower level managers/supervisors.**   Distinction from 45:   * manages a large department or division with complex operations and many lower level managers/supervisors (versus a large department with significant lower-level supervisors) |  |

**EF1 MENTAL EFFORT**

**=================**

* Mental effort measures the cumulative duration and intensity of mental and sensory demands required to perform the job.
* Mental demands are those activities that use concentration and cause fatigue (e.g. thinking, active and passive listening, interpreting, observing).
* Sensory demands are those activities that use one or more of the 5 senses in the course of job requirements.

|  |  |
| --- | --- |
| VERY LOW CONCENTRATION ------------------------------------------------------------------------------ | 10 |
| * **Provides routine information** |  |
| LOW CONCENTRATION ------------------------------------------------------------------------------------------------- | 20 |
| * **For example:** * **reads,** * **transcribes,** * **fills in formulas,** * **performs routine data entry,** * **makes simple calculations,** * **prepares standard reports.** |  |
| MODERATE CONCENTRATION ------------------------------------------------------------------------------------ | 30 |
| * **For example:** * **writes original material, including minute-taking;** * **deciphers, edits, analyses,** * **authenticates documents;** * **prepares statistical reports;** * **constant learning of new** * **equipment,** * **programs,** * **policies, or** * **protocols is required.** |  |
| HIGH CONCENTRATION ------------------------------------------------------------------------------------------------ | 40 |
| * **For example:** * **performing tasks requiring great precision and requiring attention to many details at a time;** * **detailed analysis or forecasting in relation to important decisions** |  |
| VERY HIGH AND SUSTAINED CONCENTRATION ----------------------------------------------------------- | 50 |
| * **For example:** * **research work;** * **preparing projects of importance or policy that requires a rigorous approach and attention to very fine detail.** |  |

**EF2**

**PHYSICAL EFFORT**

* This factor measures the level of physical effort that is inherent in the performance of the required duties of a position.
* In addition to measuring the amount of energy deployed to move objects of a certain weight, it is also intended to measure
* the amount of energy used to maintain different working postures,
* visual and/or auditory intense activities and/or
* repetitive movements.
* This factor has been developed to recognized physical effort both for the female predominant jobs as well as the male predominant jobs.

|  |  |  |
| --- | --- | --- |
| **Description** | **Frequency** | **Duration** |
| Requirement to work in a seated position |  |  |
| Requirement to work in a standing position |  |  |
| Requirement to walk |  |  |
| Bending/crouching/kneeling or similar positions |  |  |
| Working on ladders, stools or scaffolds |  |  |
| Performing repetitive movements (keyboarding, sorting, pushing, cutting, pressing, sawing, etc.) |  |  |
| Scrutinizing, distinguishing\*, or isolating by eye or ear (reconciling, tracking expenses, monitoring, editing, tuning instruments, diagnosing, etc) |  |  |
| Lifting, carrying, pushing, pulling or holding weights >25kg or expending equivalent effort |  |  |
| Lifting, carrying, pushing, pulling or holding weights more than 10 kg and up to 25 kg or expending equivalent effort |  |  |
| Lifting, carrying, pushing, pulling or holding weights more than 3-10 kg or expending equivalent effort |  |  |

**Frequency Duration**

|  |  |
| --- | --- |
| **Degree** | **Description** |
| 1 | Daily total of more than 1 hour and up to 2 hours |
| 2 | Daily total of more than 2 hours and up to 4 hours |
| 3 | Daily total of more than 4 hours |

|  |  |
| --- | --- |
| **Degree** | **Description** |
| 1 | 2-3 times a week, most weeks |
| 2 | Every day, most weeks |

\*to make fine or subtle differentiations

**CALCULATION CHART** (for calculating total points)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Factor** | **Freq** | **Degree** | **Freq \* Degree** | **Weight** | **Score** |
| 1. | Requirement to work in a seated position |  |  |  | 1 |  |
| 2. | Requirement to work in a standing position |  |  |  | 2 |  |
| 3. | Requirement to walk. |  |  |  | 1 |  |
| 4. | Bending/crouching/kneeling or similar positions |  |  |  | 2 |  |
| 5. | Working on ladders, stools or scaffolds |  |  |  | 3 |  |
| 6. | Performing repetitive movements |  |  |  | 2 |  |
| 7. | Scrutinizing, distinguishing or isolating by eye or ear. |  |  |  | 2 |  |
| 8. | Lifting, carrying, pushing, pulling or holding weights >25kg or expending equivalent effort |  |  |  | 4 |  |
| 9. | Lifting, carrying, pushing, pulling or holding weights more than 10 kg and up to 25 kg or expending equivalent effort |  |  |  | 3 |  |
| 10. | Lifting, carrying, pushing, pulling or holding weights more than 3-10 kg or expending equivalent effort |  |  |  | 2 |  |

**Rating Matrix**

|  |  |  |
| --- | --- | --- |
| **PHYSICAL EFFOR** | | |
| **MIN** | **MAX** | **LEVEL** |
| 0 | 6 | 10 |
| 7 | 16 | 20 |
| 17 | 30 | 30 |
| 31 | 48 | 40 |
| 49+ |  | 50 |

**Note: The University and the Union agree that the matrix is tentative and is subject to further amendments with the mutual agreement of both the parties.**

**WO1 TEMPERATURE, NOISE AND OTHER ENVIRONMENTAL CONDITIONS**

**====================================================================**

* Consider the conditions under which the work is performed and the average exposure to disagreeable elements such as
* weather,
* changes or extremes of temperature,
* fumes,
* dirt or waste products,
* blood,
* loud noise and
* poor lighting or glare.

|  |  |
| --- | --- |
| OFFICE ENVIRONMENT, NORMAL COMFORT LEVEL ------------------------------------------- | 10 |
| * **work environment is clean and varies little from a normal comfort level:** * **heated in winter, air-conditioned in summer,** * **no exposure to outside conditions with** * **little significant background or machinery noises.** |  |
| OCCASIONAL EXPOSURE TO A DISAGREEABLE ELEMENT ----------------------------------------------- | 15 |
|  |  |
| REGULAR EXPOSURE TO A DISAGREEABLE ELEMENT ---------------------------------------------------- | 20 |
| * **exposure to a disagreeable element for up to half of work period** * **e.g. some noise or weather; computer rooms** |  |
| REGULAR EXPOSURE TO A FEW DISAGREEABLE ELEMENTS ------------------------------------------ | 25 |
| * **exposure to a few disagreeable elements for up to half of work period;** * **e.g. clean lab with chemical exposure** |  |
| FREQUENT EXPOSURE TO SOME DISAGREEABLE ELEMENTS OR ONE VERY DISAGREEABLE ELEMENT FOR MORE THAN HALF OF WORK PERIOD ------------------------------- | 30 |
| * **e.g. bio-lab; fabrication work** |  |
| SUSTAINED EXPOSURE TO SOME DISAGREEABLE ELEMENTS OR ONE VERY  DISAGREEABLE ELEMENT FOR MORE THAN HALF OF WORK PERIOD ------------------------------- | 35 |
| * **e.g. animal facility** |  |
| EXPOSURE TO SOME DISAGREEABLE ELEMENTS OR ONE VERY DISAGREEABLE  ELEMENT FOR THE MAJORITY OF THE WORK PERIOD ---------------------------------------------------- | 40 |
|  |  |
| EXPOSURE TO A COMBINATION OF VERY DISAGREEABLE ELEMENTS FOR  MAJORITY OF WORK PERIOD ---------------------------------------------------------------------------------------- | 45 |
|  |  |
| CONTINUOUS EXPOSURE TO A COMBINATION OF VERY DISAGREEABLE  ELEMENTS OR ONE VERY DISAGREEABLE ELEMENT FOR ENTIRE WORK PERIOD ------------ | 50 |
| * **except for scheduled breaks;** * **e.g. a morgue or pathology lab** |  |

**WO2 HAZARDS**

**==========**

Consider the extent to which the job requires exposure to short or long term health or accident risks including biohazards and radiation.

|  |  |
| --- | --- |
| (I) LITTLE HAZARD ------------------------------------------------------------------------------------------------------- | 10 |
| * **minimal exposure to health or accident risks** |  |
| (II) LITTLE HAZARD ------------------------------------------------------------------------------------------------------- | 15 |
| * **limited exposure to health or accident risks;** * **exposure to risk of overuse injury associated with some repetitive motion not longer than 2 hours at a time** |  |
| (I) SOME HAZARD --------------------------------------------------------------------------------------------------------- | 20 |
| * **some health or accident risk where possible effect on health is limited.** * **For example:** * **low level electric shock;** * **exposure to chemicals, solvents, glues and other chemicals;** * **climbing ladders;** * **risk of back injury;** * **exposure to risk of overuse injury associated with repetitive motion for more than 2 but less than 4 hours at a time**   Distinction from Rating 15:   * some health/accident risks (versus minimal) * possible effects on health is limited. |  |
| (II) SOME HAZARD -------------------------------------------------------------------------------------------------------- | 25 |
| * **some health or accident risk where limited effect on health is more likely.** * **For example:** * **regular exposure to dangerous substances;** * **cuts and burns;** * **harm from chemical burns;** * **machine shop work;** * **exposure to risk of overuse injury associated with repetitive motion for 4 hours**   Distinctions from Rating 20:   * limited effect on health is morely likely (rather than possible effect on health is limited) |  |
| (I) MODERATE HAZARD; SERIOUS INJURIES SOMEWHAT POSSIBLE --------------------------------- | 30 |
| * **includes exposure to health risks associated with constant repetitive motion or accident risk – may result in disability.** * **For example:** * **combination of exposure to machining and biohazards;** * **exposure to low level radiation;** * **lab work dealing with dangerous biohazards**   Distinctions from Rating 25:   * exposure to health risks/accidents associated with constant repetitive motion * may result in disability (rather than limited effect on health) |  |
| (II) MODERATE HAZARD; SERIOUS INJURIES POSSIBLE --------------------------------------------------- | 35 |
| * **includes exposure to health risks associated with constant repetitive motion,** * **exposure to hazard or accident risk - greater likelihood of resulting in disability.** * **For example:** * **working with radioactive compounds;** * **dealing with potentially hazardous biological agents**   Distinctions from Rating 30:   * greater likelihood of resultant disability (rather may result in disability) |  |
| (I) SEVERE HAZARD; SERIOUS INJURIES VERY POSSIBLE ----------------------------------------------- | 40 |
| * **includes exposure to serious health risks including** * **diseases related to environmental conditions,** * **exposure to hazards, or accidents related to physical conditions or moving machinery –** * **may result in serious long-term disability.** * **For example,** * **potential exposure to infectious diseases.**   Distinctions from Rating 35:   * may result in serious long-term disability (rather than the possibility of disability) * exposure to serious health risks * diseases related environmental conditions * risk of hazards/accidents related to physical conditions/moving machinery |  |
| (II) SEVERE HAZARD; SERIOUS INJURIES VERY POSSIBLE ----------------------------------------------- | 45 |
| * **includes exposure to serious health risks including diseases related to environmental conditions,** * **exposure to hazards or accidents related to physical conditions or moving machinery –** * **the nature of the research or procedures would lead to a greater likelihood of serious long-term disability**   Distinctions from Rating 40:   * nature of research or procedures would lead to a greater likelihood of serious long-term disability (rather than may result in serious long-term disability) |  |
| CHANCE OF LIFE-THREATENING ACCIDENT OR HEALTH RISKS --------------------------------------- | 50 |
| * **Exposure to potentially fatal health risk.** * **For example:** * **high voltages,** * **exposure to serious health risks such as Ebola**   Discrimination from Rating 45:   * exposure to potentially fatal health risks (rather than serious long-term disability) |  |

### WO3 STRESS

**========**

|  |  |
| --- | --- |
| * No particular stressful elements inherent to the job | 10 |
| * Occasional (minimal) exposure to one or two moderately stressful elements | 15 |
| * Regular exposure to one or two moderately stressful elements | 20 |
| * Greater exposure to stressful elements than described at Level 20, * but less than that described at Level 30 | 25 |
| * Frequent exposure to one or two moderately stressful elements OR * Regular exposure to three or more moderately stressful elements OR * Occasional exposure to 1 extremely stressful element | 30 |
| * Greater exposure to stressful elements than described at Level 30, * but less than that described at Level 40 | 35 |
| * Continuous exposure to 1-2 moderately stressful elements or * frequent exposure to three or more moderately stressful elements OR * Regular exposure to at least one extremely stressful element | 40 |
| * Frequent exposure to three or more moderately stressful elements AND * regular exposure to at least one extremely stressful element | 45 |
| * Continuous exposure to three or more moderately stressful elements AND * regular exposure to at least one extremely stressful element | 50 |

**Notes to Raters**

Occasional: Less than 10% of the time on an annual basis

Regular : More than 10% and less than 25% on an annual basis

Frequent : More than 25% and less than 60% of the time on an annual basis

Continuous: More than 60% of the time on an annual basis

|  |
| --- |
| **Moderately stressful elements:** |
| Emotionally-charged situations that require listening, assistance, or support. |
| Difficult situations that involve conflictive interactions. |
| Situations which involve contact with people with unresolvable problems where the incumbent cannot change the outcome (e.g., socio-economic problems, terminal or serious illness; ongoing waiting list or backlog). |
| Isolated work spaces. |
| Unchanging and repetitive work. |
| Competing and/or simultaneous deadlines. |
| Unpredictable or urgent assignments. |
| Multiple reporting relationships |
| High performance-based expectations (e.g., marketing targets, sales) |
| Ongoing high pace of work requiring accelerated work pace (e.g., peak periods) |
| Frequent human monitoring (close supervision) or machine pacing of work. |
| Working in a fishbowl (constant exposure to public/clients, etc.) |
| Exposure to upset and anxious clients |
| Exposure to verbal abuse |
|  |
| **Extremely stressful elements:** |
| Exposure to hostile or violent interactions |
| Exposure to threats against incumbent’s personal safety |
| Make-or-break performance targets |
| Time sensitive crisis that must be resolved |

**WO4 WORK INTERRUPTIONS AND DISTRACTIONS**

**=============================================**

Consider the number and kind of interruptions to the work process and distractions in the work area.

|  |  |
| --- | --- |
| NO INTERRUPTIONS, NO DISTRACTIONS IN WORK AREA ------------------------------------------------- | 10 |
| * **work is not interrupted,** * **private work space** |  |
| OCCASSIONAL ROUTINE INTERRUPTIONS, FEW DISTRACTIONS -------------------------------------- | 15 |
| * **work is occasionally interrupted by predictable contacts,** * **little activity in work area;** * **private work space in area with distractions/shared office;** * **few interruptions for routine requests**   Distinctions from Rating 10:   * work is occasionally interrupted (rather than is not interrupted) * relatively private work space with * little activity in area or * few interruptions for routine requests |  |
| REGULAR ROUTINE INTERRUPTIONS, FEW DISTRACTIONS --------------------------------------------- | 20 |
| * **work is interrupted by predictable contacts;** * **some activity in work area;** * **open area;** * **quiet;** * **cubicles;** * **regular interruptions for routine requests**   Distinctions from Rating 15:   * work is interrupted by predictable contacts (rather than occasionally interrupted) * relative open work space with * some activity in area (rather than little activity) * regular interruptions for routine requests (rather than few interruptions) * is quiet |  |
| FREQUENT ROUTINE INTERRUPTIONS, SOME DISTRACTIONS ----------------------------------------- | 25 |
| * **work is interrupted by predictable contacts,** * **some distractions in work area;** * **busy/public/noisy open area or lab;** * **frequent (high volume) interruptions for routine requests or** * **occasional crisis.**   Distinctions from Rating 20:   * some distractions in work area (rather than some activity) * frequent/high volume interruptions (rather than regular interruptions) for routine requests * occasional crisis * busy/public/noisy (rather than quiet) |  |
| REGULAR INTERRUPTIONS & DISTRACTIONS --------------------------------------------------------------- | 30 |
| * **some interruptions and distractions are unusual or unpredictable,** * **limited effect on work process or meeting of deadlines;** * **public, open area;** * **regular (regularly occurring) interruptions;** * **unpredictable action required.**   Distinctions from Rating 25:   * some unusual/unpredictable interruptions and distractions * unpredictable action required * limited effect on work process or meeting of deadlines |  |
| MANY INTERRUPTIONS & DISTRACTIONS ----------------------------------------------------------------------- | 35 |
| * **regular interruptions and distractions are unusual or unpredictable,** * **causing disruption to work process,** * **increasing likelihood of missing deadlines;** * **open area, multiple source of distractions (multiple activities);** * **frequent (high volume) interruptions;** * **unpredictable action required.**   Distinctions from Rating 30:   * regular unusual/unpredictable interruptions and distractions * causing disruption to work process (rather than limited effect on work process) * increasing likelihood of missing deadlines (rather than limited effect on meeting deadlines) * multiple sources of distraction |  |
| (I) MANY INTERRUPTIONS, MUCH DISTRACTING ACTIVITY IN WORK AREA ------------------------ | 40 |
| * **regular (regularly) occurring interruptions** * **busy open work area;** * **frequent effect on work process, deadlines and production;** * **resolves crisis**   Distinctions from Rating 35:   * regular(ly) occurring interruptions * busy open work area * frequent effect on work process (rather than increasingly likelihood of effect) * frequent effect on deadlines and production (rather than increasing likelihood of effect) * resolves crisis (rather than occasional crisis as found at Rating 25) |  |
| (II) MANY INTERRUPTIONS, MUCH DISTRACTING ACTIVITY IN WORK AREA ----------------------- | 45 |
| * **frequent interruptions and distractions are unpredictable or unusual;** * **possible significant effect on work process, deadlines and production;** * **resolves crisis**   Distinctions from Rating 40:   * frequent unusual/unpredictable interruptions and distractions (rather than regular unusual interruptions/distractions) * possible significant effect on work process (rather than mere frequent effect) * possible significant effect on deadlines and production (rather than mere frequent effect) |  |
| CONSTANT INTERRUPTIONS, CONSTANT DISTRACTING ACTIVITY IN WORK AREA ------------ | 50 |
| * **constant interruptions of the work process with highly distracting activities**   Distinction from Rating 45:   * constant interruptions (rather than frequent disruptions) with * highly distracting activities |  |

**WO5 SOCIAL DISRUPTION REQUIRED BY WORK SCHEDULING**

**=========================================================**

Consider the amount of social disruption as a result of irregularities in the work schedule.

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| --- | --- |
| REGULAR DAYTIME SCHEDULE ------------------------------------------------------------------------------------- | 10 |
|  |  |
| REGULAR DAYTIME SCHEDULE, SOME OVERTIME ---------------------------------------------------------- | 15 |
| * **Overtime on weekdays** |  |
| REGULAR SCHEDULE WITH SOME OVERTIME OR SOME WEEKENDS ------------------------------- | 20 |
| * **little social disruption;** * **occasional overtime on weekends** |  |
| REGULAR SCHEDULE INCLUDES EVENINGS/WEEKENDS; OCCASIONAL ON-CALL -------------- | 25 |
| * **limited social disruption;** * **regular evening work;** * **frequent overtime;** * **regular weekend schedule;** * **occasional on-call – available by phone or computer;** * **a set schedule of alternating days/evenings/weekends**   Distinctions from Rating 20:   * limited (rather than little) social disruption * frequent overtime (rather than occasional overtime on weekends) * every other factor is distinguishing. |  |
| REGULAR SCHEDULE INCLUDES EVENINGS/WEEKENDS; REGULARLY REQUIRED  TO BE ON-CALL ------------------------------------------------------------------------------------------------------------ | 30 |
| * **some social disruption;** * **occasional travel;** * **occasional on-call – available on-site;** * **regular night shift;** * **occasional overnight travel**   Distinctions from Rating 25:   * some (rather than limited) social disruption * occasional on-call – available at site (rather than by phone/computer) * regular night shift (rather than evening shift) * occasional travel * occasional overnight travel |  |
| IRREGULAR SCHEDULE, WITH SOME OVERTIME --------- --------------------------------------------------- | 35 |
| * **some social disruption,** * **some demands on personal time, some travel;** * **occasional on-call – available on a confined radius;** * **some overnight travel**   Distinctions from Rating 30:   * some demands on personal time * some travel (rather than occasional) * occasional on-call available in confined radius (rather than available on-site) * some overnight travel (rather than occasional) |  |
| IRREGULAR SCHEDULE, WITH OVERTIME, AND OCCASIONAL TRAVEL ----------------------------- | 40 |
| * **some demands on personal time,** * **regular overnight travel;** * **regularly scheduled to be on-call and within a confined radius or be available on-site;** * **regular alternating shifts,** * **including nights; or** * **rotating shifts with block scheduling and no nights**   Distinctions from Rating 35:   * regular overnight travel (rather than merely some) * regularly on-call within a confined radius or available on-site (rather than occasionally) * regular alternating shifts, * including nights, or * rotating shifts on block schedule with no nights |  |
| IRREGULAR SCHEDULE AND REGULAR TRAVEL, OR ON CALL TO A CONFINED RADIUS ----- | 45 |
| * **frequent demands on personal time;** * **frequently scheduled to be on-call and within a confined radius;** * **rotating shifts;** * **block scheduling including nights**   Distinctions from Rating 40:   * frequent demands on personal time (rather than some demands) * frequently on-call within a confined radius or available on-site (rather than regularly) * rotating shifts (rather than regular alternating shifts) |  |
| EXTENSIVE OVERTIME, FREQUENT TRAVEL AND FREQUENT AND REGULAR  DEMANDS ON PERSONAL TIME ------------------------------------------------------------------------------------- | 50 |
| * **frequent unpredictable schedule and shift changes;** * **frequent long-term travel several times a year**   Distinctions from Rating 45:   * frequent unpredictable schedule/shifts (rather than rotating shifts) * frequent long-term travel. |  |