

# STEWARDS' TRAINING: JOB EVALUATION, OCTOBER 2023

## **JOB EVALUATION**

Job evaluation is a process that ensures equal pay for work of equal value—in other words, pay equity. The University and the Union use an agreed-upon, gender-neutral system to assess positions based on 4 main criteria. It is extremely important to understand that job evaluation is about a given job, *not* about the individual who is fulfilling the duties or responsibilities of the role.

## **SES/U (SIMPLE EFFECTIVE SOLUTION, UNIVERSITY) FACTOR SYSTEM**

Each position is rated on each of the 17 sub-factors in the SES/U system. As required by the *Pay Equity Act*, the SES/U has 4 overall criteria, or factors:

1. Skill
2. Effort
3. Responsibility
4. Working Conditions

Each of the 4 factors is further divided into 2 or more sub-factors, as outlined below:

- **SKILL**
  - **SK1:** Previous Education (11%)
  - **SK2:** Previous Experience (11%)
  - **SK3:** Interaction Skills (8%)
  - **SK4:** Movement Skills (6%)
  - **SK5:** Decision Making (11%)
  
- **RESPONSIBILITY**
  - **RE1:** Responsibility for Information (9%)
  - **RE2:** Responsibility for Materials, Equipment and/or Outcomes (9%)
  - **RE3:** Responsibility for the Safety of Others (3%)
  - **RE4:** Financial Responsibility (8%)
  - **RE5:** Responsibility to Manage or Direct Others (8%)
  
- **EFFORT**
  - **EF1:** Mental Effort (5%)
  - **EF2:** Physical Effort (4%)

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- **WORKING CONDITIONS**

- **WO1:** Temperature, Noise and other Environmental Conditions (1%)
- **WO2:** Hazards (2%)
- **WO3:** Stress (2%)
- **WO4:** Work Interruptions and Distractions (1%)
- **WO5:** Social Disruption Required by Work Schedule (1%).

As illustrated above, each of the 17 sub-factors has been assigned a specific weight (shown as a percentage). The total points are calculated based on applying a formula to the 17 sub-factors. The total points generally indicate the value of each position to the university. Each pay band is comprised of a 19-point range; based on the total points allotted, a position is then placed in the corresponding pay band.

\*With the exception of mental/physical effort, ratings are attributed in increments of 10, 15, 20, 25, 30, 35, 40, 45 with 50 being the highest score attainable for each sub-factor.

### **THE PROCESS**

#### **NEW POSITIONS**

New positions are created by the university on an ongoing basis. They are assessed by the university when created and sent to the union for review. The USW job evaluation team then assesses the information provided and determines whether the position is appropriately classified as per the SES/U factors and the agreed job classes. The union then has 20 working days to communicate to the University whether it is the classification (including the SES/U factors, the job class, or both) or whether it agrees with the university's proposed placement.

Incumbents hired into newly created positions will be sent the new position questionnaire after their 6-month probationary period is complete. These are sent to members through the University's Job Evaluation department and copied to the union. Completion of the questionnaire is *optional and there is no deadline for completion*. Members who think they may have received this email but require the link sent to them again can email the USW job evaluation team at [jec@usw1998.ca](mailto:jec@usw1998.ca). **Members who are concerned that their new position is not properly classified should reach out to the Union's job evaluation team for a meeting prior to completing the new position questionnaire at [jec@usw1998.ca](mailto:jec@usw1998.ca) and to discuss their concerns further.**

**STEWARDS' ROLE:** If a member approaches you because they have received the new position questionnaire, you can refer them to the [jec@usw1998.ca](mailto:jec@usw1998.ca) and the USW Job Evaluation Team will be happy to discuss their questions. A common question from members is that they want to verify that the new position questionnaire is coming from a legitimate source because it comes from a generic UofT email account.

#### **EMPLOYEE-INITIATED RECLASSIFICATIONS (EIR)**

Members who feel their positions are under-classified can initiate a reclassification once they have worked in the role for a minimum of six months. **It is strongly advised that they arrange a meeting with one of the**

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**union's job evaluation team members** to ensure they understand the system used and to determine whether there is enough relevant information to facilitate a change to their classification. To begin this process, the member completes a Statement of Significant Change Form (SSCF) which requires their response to four questions, as applicable:

1. How have the skills in your position significantly changed?
2. How have the responsibilities in your position changed?
3. How has the effort in your position significantly changed?
4. How have the working conditions in your position significantly changed?

The SSCF is an abridged version of the questionnaire, which has been adapted to focus only on the areas of potential change in a position.

We strongly recommend that members reach out to the Job Evaluation team prior to completing and submitting their finalized SSCF. This way, members can receive valuable feedback on their draft SSCF such as suggestions as to how to present significant changes to their role in the best possible light. It is important for the member to understand how the SSCF will be used, which is why a meeting with the union's job evaluation team prior to its completion is essential.

Once the SSCF has been submitted, the university reviews the information and determines whether there is 'significant change,' meaning the position has evolved beyond its intended expectations OR that a change to the classification and pay band are justified. The university's assessment of the EIR is sent to the member and copied to the union's job evaluation committee. The union then has 20 working days to communicate whether it agrees with or disputes the university's assessment.

**\*The test for members seeking an EIR is to establish that there is a distinct change in the nature and character of the duties which then influence the levels for each factor. A change in the arrangement of duties or the introduction of greater volume of similar duties is *not* sufficient to warrant a change in classification.**

**STEWARDS' ROLE:** Often a member will contact a steward because they are dealing with multiple issues. Some may relate to their rights under the collective agreement; some may be related to job evaluation and whether they believe their role is not properly classified. They may simply want to understand more about the SES/U system or their job description. You can refer them to the job evaluation team for assistance with any job evaluation-related questions. If the member is agreeable, you may request to join the preliminary meeting with our Job Evaluation Analyst to learn more, particularly if the issues they are facing have a high level of overlap such as their **classification**, workload and overtime, which are commonly overlapping concerns raised by members. The job evaluation team regularly works with Stewards and Grievance Officers to better address the concerns that members raise.

### **MANAGER-INITIATED RECLASSIFICATIONS (MIR)**

Similar to an EIR, a Manager-Initiated Reclassification is submitted by a member's supervisor, where it has been established that the duties and responsibilities have warranted its placement in a new job class and pay band and that there have been significant changes to the role such that it no longer fits within its existing job class placement.

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Unlike EIRs, the union is notified after the information has been submitted by a member's manager and an assessment has been made. The union has no control over the timelines in an MIR until we receive official notification. In some cases, they are handled quickly on the management side. In other cases, they are held up for months and neither the member nor the union can get updates on the status.

**STEWARDS' ROLE:** If a member contacts you because they believe their manager might be thinking of filing a manager-initiated reclassification, you can refer the member to the Job Evaluation Team. It is not commonly known but we can help members to be more knowledgeable about the Manager-Initiated Reclassification process and provide helpful resources.

### DISPUTE RESOLUTION PROCESS

If the Union and Management do not agree, there is a Dispute Resolution Process outlined in the [Maintenance Protocol](#).

When the Union disagrees with the University's assessment of a new position, the University's response to an employee reclassification request, or the University's job class placement in a manager-initiated reclassification request, the Union can exercise its right to file a dispute under the [Maintenance Protocol](#).

The dispute resolution process has three stages. The Union reviews the case's merits prior to advancing to the next phase of the dispute resolution process, as is done in the grievance procedure. It is not an automatic process for a case to be advanced to the next stage of the process.

1. **Step 1:** The informal meeting between the parties. The Union and the University job evaluation teams meet to attempt to resolve the dispute relating to the position or group of positions. These disputes are reviewed **chronologically**.
2. **Step 2:** If a satisfactory resolution has not been reached at the informal meeting of the parties, the Union may then advance the case to the third-party referees. The referees are independent third-party experts, one selected by the Union and one selected by the University, who will meet to review the case and make a ruling on the case. The ruling is legally binding and final and can be referred to as a precedent for future cases.
3. **Step 3:** If the referees fail to come to a resolution, the case *may be* advanced to Arbitration. The steps for a case to move to arbitration involve a review and recommendation by the Job Evaluation Team, followed by a recommendation to the Grievance Committee and finally a recommendation to the Executive Committee. A case cannot advance to arbitration without Executive Committee approval. Once the case has been heard by an arbitrator, they will make a final decision that is legally binding and can be used for future precedent.

### THE ROLE OF STEWARDS IN JOB EVALUATION

When a member comes forward for assistance, they may have many intersecting concerns. These concerns could include wanting to have their role reviewed and reclassified, concerns about workload and volume of work, concerns about overtime, stress, treatment and so forth. Often, when a member comes forward, they may need help from a member of the USW Job Evaluation Team, a Grievance Officer and/or a Health and Safety

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representative. They may need meetings with representatives from each group to help untangle and resolve their concerns.

When a member approaches a Steward about concerns, for example, maybe they are concerned their workload is too high and as well that they are doing higher level work, it is encouraged that you listen to their concerns and if they express that they believe they are doing higher level work, refer them to [jec@usw1998.ca](mailto:jec@usw1998.ca). If your member is agreeable, and you are interested, you can attend the preliminary meeting to review the job evaluation overview and the member's case particulars. We encourage members who are seeking a reclassification to meet several times with our Job Evaluation Analysts to ensure they have the most effective draft Statement of Significant Change Form to submit for their reclassification request. It often takes members a few months of reflection and working with the USW Job Evaluation Analyst to get their Statement of Significant Change Form ready for formally filing via the Employee Self Service (ESS).

**NOTE: This Job Evaluation Overview is focused on the Staff-Appointed system. For further details about the processes for Victoria University, University of St. Michael's College and University of Toronto Schools, please contact [jec@usw1998.ca](mailto:jec@usw1998.ca) to set up a meeting with a member of the USW Job Evaluation Team.**