

INTRODUCTION

This job evaluation plan was prepared in 1987 and is amended on a regular basis to enable client organizations to evaluate all jobs within the organization on the same plan. Hence the name Universal Job Evaluation Plan.

All factors, weightings and factor descriptions are gender neutral and meet all the requirements of pay equity legislation in Ontario, Manitoba, Quebec, Nova Scotia and the Federal Government.

This job evaluation plan has been prepared by McDowall Associates based on their experience in chairing job evaluation committees, evaluating literally thousands of jobs and preparing or extending several other job evaluation plans.

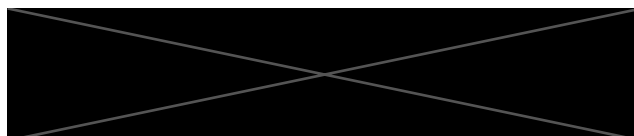
Factor level descriptions have been worded in such a way as to reduce the doubt often found by committees when using more subjective job evaluation approaches.

Over the past 20 years, this plan has been used on several thousand jobs in over 500 organizations, in both the public and private sectors. It produces a determination of internal equity that is gender neutral and consistent within each organization.

By using this plan under consulting guidance for a few days, a job evaluation committee can objectively evaluate jobs within its respective organization often with only minimal consulting assistance.

This evaluation plan and its accompanying documents are also available in French and German languages.

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FACTORS USED IN THE MCDOWALL UNIVERSAL JOB EVALUATION PLAN

KNOWLEDGE / EDUCATION / TRAINING

EXPERIENCE

DECISIONS & SKILL IN OPERATIONS

INGENUITY & CREATIVITY

INDEPENDENT ACTION

BUDGETS & FUNDS

MENTAL EFFORT & IMPACT

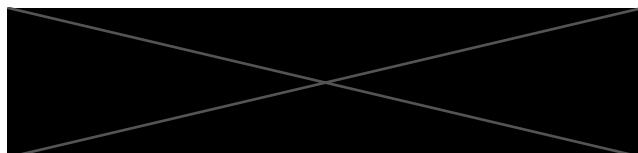
CONFIDENTIALITY

LEADERSHIP, SUPERVISION & FUNCTIONAL ADVICE

INFLUENCING OTHERS (CONTACTS)

PHYSICAL SKILL & EFFORT

DISRUPTION TO LIFESTYLE & WORKING CONDITIONS



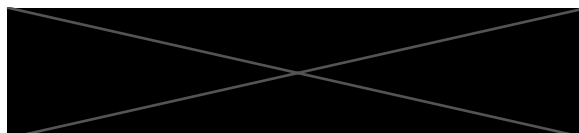
FACTOR 1

KNOWLEDGE / EDUCATION / TRAINING

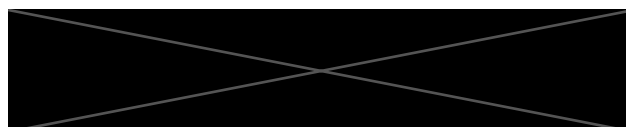
This factor measures the skill gained from formal education and training that is necessary to perform the job. When using this factor, consideration must be given to the following:

- The level of education and training required to perform the job is measured not at a higher level that may be desired for future promotion or training or a hiring specification based on labour market conditions.
- Courses currently available at all types of learning institutions and by formal recognized home study are measured in this factor.

Factor Level	Level of Education or Equivalent
1.	Equivalent to Less Than High School <ul style="list-style-type: none">▪ Basic Reading and Communication Skills▪ Ability to use basic Arithmetic▪ Ability to follow Directions
2.	Equivalent to Partial Completion of High School <ul style="list-style-type: none">▪ Courses generally do not provide skills required for job▪ Ability to perform most clerical functions not requiring special courses▪ Ability to operate equipment and machinery after instruction
3.	Equivalent to Completion of High School <ul style="list-style-type: none">▪ Completion of vocational and business courses commonly taught at high school level▪ Knowledge to operate a computer using standard programs (Word, PowerPoint, Excel)▪ Completion of specific vocational courses required for a certificate to work in an occupation (not a fully regulated trade)▪ Completion of high school general courses▪ Several courses in various trades without specialty or certification required
4.	Equivalent to Completion of High School Plus an Additional Work Related Program Up To One Academic Year of Duration <ul style="list-style-type: none">▪ Course or courses specific to occupational area▪ Often courses result in certificate in occupational specialty
5.	Equivalent to Completion of Community College of About Two Academic Years <ul style="list-style-type: none">▪ Generally following high school▪ Specialized trade or occupational courses



Factor Level	Level of Education or Equivalent
6.	<p>Equivalent to Completion of Specialized Courses Normally Taught in Community or Recognized Specialty Colleges Consisting of About Three Academic Years</p> <ul style="list-style-type: none"> ▪ Completion of courses required for recognized certification, diploma or license
7.	<p>Equivalent to University Graduation in General Courses</p> <ul style="list-style-type: none"> ▪ Knowledge generally not applied directly to work ▪ Analytical, critical thinking and research skills gained
8.	<p>Equivalent to University Graduation with Additional Specialized Courses up to One Academic Year</p> <ul style="list-style-type: none"> ▪ Additional course or courses in specialized area of occupation requiring University graduation, as a prerequisite or a four year Honours program
9.	<p>Equivalent to University Graduation in Specialized or Occupational Field</p> <ul style="list-style-type: none"> ▪ Knowledge gained applied directly to work ▪ 4 year plus professional designation in for example: <ul style="list-style-type: none"> ▪ Engineering, C.A, C.M.A., Physiotherapist, RN, Dietician, PHI ▪ Undergraduate degree preferred for entry into program
10.	<p>Equivalent to University Completion at Masters Level in Specialized or Occupational Field</p> <ul style="list-style-type: none"> ▪ Knowledge applied directly to work ▪ Examples: M.B.A., M.L.S., M.S.W., L.L.B., Nutritionist
11.	<p>Equivalent to University Completion in Specialized Field at Doctorate Level</p> <ul style="list-style-type: none"> ▪ NOT a PhD ▪ Examples: Medical Doctor, Dentist
12.	<p>Equivalent to University Completion at PhD. Level</p> <ul style="list-style-type: none"> ▪ Involves academic studies at the frontier of existing knowledge in the field of specialization



FACTOR 2

SKILL GAINED BY EXPERIENCE

This factor measures the skill required to perform the job that is gained from actual experience doing the job.

When considering this factor, determine the amount of time required and the education already determined to perform the job adequately.

When evaluating this factor, care must be taken to include in-house training and experience needed on other jobs or in other organizations prior to assuming responsibilities of the job under consideration as well as time to become proficient in carrying out the job itself.

Note: Progressive experience does not specify elapsed time. Progressive experience is the cumulative time required to gain sufficient knowledge to carry out the job.

Factor Level	Time Period Required to Learn the Job
1.	Up to and including 1 month
2.	Over 1 month and including 3 months
3.	Over 3 months and including 6 months
4.	Over 6 months and including 1 year
5.	Over 1 year and including 2 years
6.	Over 2 years and including 3 years (often progressive experience)
7.	Over 3 years and including 4 years (generally progressive experience)
8.	Over 4 years and including 5 years (generally progressive experience)
9.	Over 5 years and including 7 years (progressive experience)
10.	Over 7 years and including 10 years (progressive experience)
<i>Generally Only the Most Senior Positions In the Organization Require More than 10 Years Progressive Experience</i>	
11.	10 to 15 Years
12.	Over 15 Years



FACTOR 3

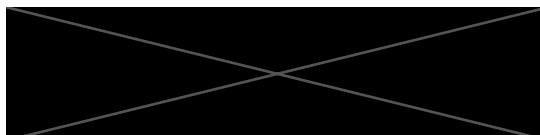
RESPONSIBILITY FOR DECISIONS AND SKILL IN OPERATIONS

This factor measures the responsibility for the types and complexity of decisions inherent in the job under consideration. Virtually every job has some form of decisions inherent in its responsibilities. These may be task, action or contemplative oriented decisions.

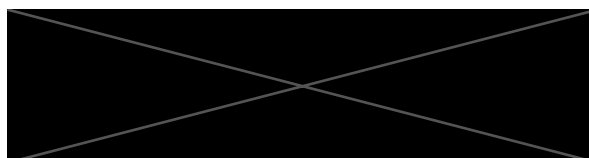
When examining the types of decisions, and levels of decisions; consider the complexity of the problems and the initiative, choice of action and judgement required to analyze the problem and make a decision.

Note: Some bullets may or may not apply.

Factor Level	Type of Tasks and/or Decisions
1.	Repetitive Routine Tasks <ul style="list-style-type: none">▪ Easily understood procedures and operations▪ Little or no latitude exists for exercising judgement▪ Virtually no set-up or controlled tolerances
2.	Limited Variety of Routine Tasks <ul style="list-style-type: none">▪ Decisions involve steps in tasks assigned▪ May include routine recording of data▪ May operate one relatively simple machine or piece of equipment requiring simple set-up
3.	Patterned Decisions of Various Tasks <ul style="list-style-type: none">▪ Decisions usually involve selecting from one of several optimal solutions▪ Decisions may involve accuracy and quality of work employee is providing▪ General skill and accuracy required with diversity of skills for operating several types of machinery
4.	Standardized Procedures, Several Routine Tasks or Operations <ul style="list-style-type: none">▪ Judgement required but situations generally covered by procedures, standards or precedents▪ Decisions are often made on special problems or situations on a regular basis▪ Specific skill in operating and setting up of machinery and equipment▪ Close attention required for accuracy and tolerances▪ General skill required to maintain several specific pieces of machinery
5.	Variety of Semi-Routine Tasks or Operations <ul style="list-style-type: none">▪ Clearly defined operations of many varied tasks▪ Judgement required to make decisions from numerous alternatives covered by standards and precedents of a general nature▪ Judgement required for adapting procedures to get desired end result▪ Judgement required for producing a wide range of products requiring a high degree of accuracy and close tolerances▪ Specific skills required for maintaining large variety of machinery or equipment or small variety of highly technical equipment



Factor Level	Type of Tasks and/or Decisions
6.	<p data-bbox="399 285 800 310">Defined Complex Operations</p> <ul data-bbox="448 317 1382 415" style="list-style-type: none"> <li data-bbox="448 317 1344 342">▪ Work often non-routine and follow only generally established procedures <li data-bbox="448 348 1382 415">▪ Judgement needed for analysis and solution to problems of a complex nature required – usually based on factual data
7.	<p data-bbox="399 453 1008 478">Broadly Defined Work of Specialized Nature</p> <ul data-bbox="448 485 1382 615" style="list-style-type: none"> <li data-bbox="448 485 1382 548">▪ Work requiring specialized judgement and decisions for the development of solutions <li data-bbox="448 554 1382 615">▪ Often specialized judgement and decisions which may affect several broader functions limited by nature of work
8.	<p data-bbox="399 653 959 678">Generally Defined Work of Broad Nature</p> <ul data-bbox="448 684 1419 884" style="list-style-type: none"> <li data-bbox="448 684 1419 779">▪ Analysis of broad problems generally of an operating or specialized nature requiring the development of solutions often where policies and procedures are inadequate or not established <li data-bbox="448 785 1419 848">▪ Judgement is extensive, complex and far reaching requiring the development of solutions to diverse and interrelated problems <li data-bbox="448 854 1382 884">▪ Planning operations and co-ordinating of major functions generally required.
9.	<p data-bbox="399 921 1276 947">Broadly Defined Work Requiring Frequent Operating Decisions</p> <ul data-bbox="448 953 1390 1152" style="list-style-type: none"> <li data-bbox="448 953 854 978">▪ Functionally defined objectives <li data-bbox="448 984 1390 1047">▪ Operating decisions affect major function of organization and perhaps other functions <li data-bbox="448 1054 1187 1079">▪ Situations within function may be changing on regular basis <li data-bbox="448 1085 1390 1152">▪ Analysis of data prepared by others often required for decisions to take direct action
10.	<p data-bbox="399 1190 1378 1247">Very Broadly Defined Work Requiring Both Operating and Long Range Decisions</p> <ul data-bbox="448 1253 1419 1388" style="list-style-type: none"> <li data-bbox="448 1253 1117 1278">▪ Recommends long range strategic policies of function <li data-bbox="448 1285 1419 1348">▪ Develops and implements shorter term strategic goals, and policies for an entire function <li data-bbox="448 1354 1349 1388">▪ May participate in determining longer term strategy of entire organization
11.	<p data-bbox="399 1425 1313 1482">Decisions Primarily of Policy Nature And The Most Broad Form of Operating Decisions</p> <ul data-bbox="448 1488 1370 1623" style="list-style-type: none"> <li data-bbox="448 1488 1024 1514">▪ Recommends policies and changes in policies <li data-bbox="448 1520 984 1545">▪ Determines long range strategic objectives <li data-bbox="448 1551 1370 1623">▪ Makes decisions on exceptions to major policies of an operating nature that affect entire organization
12.	<p data-bbox="399 1661 1313 1717">Determines Broad Policies and Long Range Strategic Direction of Organization</p> <ul data-bbox="448 1724 1273 1789" style="list-style-type: none"> <li data-bbox="448 1724 1159 1749">▪ Often board level or elected council policy type decisions <li data-bbox="448 1755 1273 1789">▪ Perhaps decisions of sole proprietor of relatively large organization



FACTOR 4

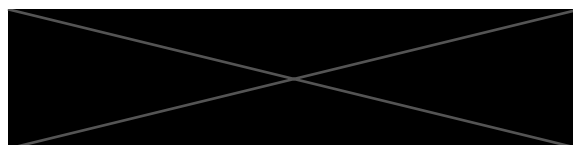
RESPONSIBILITY FOR INGENUITY AND CREATIVITY

This factor measures the ingenuity and creativity required for the solution of specific problems, broad situations or development and creative requirements of the job.

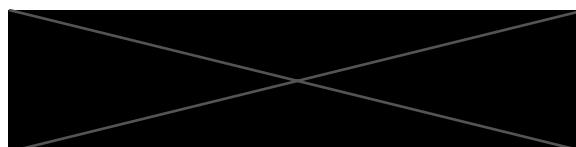
It considers the degree of original, independent thinking required to originate or develop new or improved methods, procedures, programs, plans, techniques, products, ideas or works of art.

Often jobs that rate in the higher levels of this factor have functional or staff responsibilities.

Factor Level	Description of Level of Ingenuity and Creativity
1.	Some Ingenuity Required <ul style="list-style-type: none">▪ Problems, situations and responsibilities covered by standards, precedents, procedures
2.	Routine Ingenuity <ul style="list-style-type: none">▪ Revises procedures, processes and/or approaches in own area of responsibility and work▪ May introduce new or improved methods to perform own job▪ May respond to unique work situations with revision of standard methods
3.	Refining Ingenuity <ul style="list-style-type: none">▪ May develop minor modifications to established routines in entire department or organization▪ Refinement of established or provided ideas
4.	Development Ingenuity <ul style="list-style-type: none">▪ Regularly develops improved methods, procedures, techniques or programs relating to own functions or activities using resourcefulness in applying learned knowledge or techniques.
5.	Complex Ingenuity <ul style="list-style-type: none">▪ Ingenuity or creativity applied on a routine basis to assigned generally complex projects requiring refinement and changes to products, procedures or systems▪ Often collaborates with other staff specialists on situations
6.	Originating Ingenuity and/or Creativity <ul style="list-style-type: none">▪ Applied in originating new or improved methods, procedures, products, systems in undefined and underdeveloped areas but generally as part of a larger creative effort or activity▪ May involve refining established ideas or programs of a complex nature requiring ingenuity and creativity on own efforts



Factor Level	Description of Level of Ingenuity and Creativity
7.	Research Ingenuity and/or Creativity <ul style="list-style-type: none">▪ Constant application of ingenuity and creativity in developing moderately complex techniques, programs, products or ideas in new and undefined areas▪ May involve development of new creative endeavors of artistic merit▪ May involve complex major research projects in areas previously explored to a lesser degree
8.	Artistic Merit and Original Major Research <ul style="list-style-type: none">▪ Originates and develops very complex new ideas, in undefined, often previously unexplored areas▪ May involve development of major new creative endeavors of artistic merit and original expression▪ Major research work in previously unexplored areas



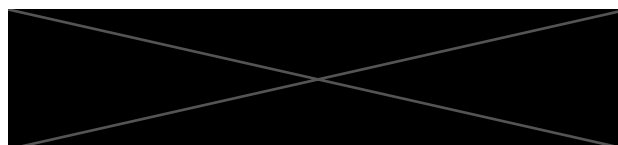
FACTOR 5

RESPONSIBILITY FOR INDEPENDENT ACTION

This factor measures the independence of action and controls on decisions required by the job.

The decisions, tasks, and ingenuity evaluated in the previous two factors are often circumscribed or limited by various controls. These controls can be in the form of supervision, operating manuals, legislation, policies, procedures, form completion, protocols, or demands and schedules of machinery, equipment or computers.

Factor Level	Description of Controls or Limiting Factors
1.	Little Choice of Action <ul style="list-style-type: none">▪ Often routine, repetitive work
2.	Limited Choice of Action <ul style="list-style-type: none">▪ Works under close guidance or checks▪ Procedures well defined▪ May be closely supervised by procedures, process or supervisor▪ Access to supervisor relatively easy and in person
3.	Some Choice of Action <ul style="list-style-type: none">▪ Instructions and standards clearly defined▪ Employee works on own referring significant changes to supervisor▪ Choice of work priorities▪ Perhaps limited access to supervisor
4.	Defined Control of Independence <ul style="list-style-type: none">▪ Instructions, standards, precedents, protocols are defined▪ Employee proceeds on own and may refer only problems to supervisor
5.	General Direction / Control Provided <ul style="list-style-type: none">▪ Objectives defined▪ Works to semi-routine instructions▪ May refer unusual problems to next level of management▪ May work within limits defined by objectives. Referral to next level of management when limits exceeded
6.	Functionally Defined Independence of Action <ul style="list-style-type: none">▪ Broad policies and general direction provided▪ Work often is non-routine however independence is within well defined framework▪ Situations are often controlled by functional practices▪ May consult with multi-disciplinary team/group▪ Consultation with supervisor concerning difficult problems is not normally expected
7.	Objectives Defined Independence <ul style="list-style-type: none">▪ Functional objectives established

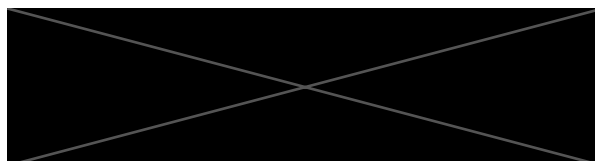


- Reporting and control generally accomplished by results
- Matters concerning policy change referred to supervisor

**Factor
Level**

Description of Controls or Limiting Factors

8. **Broadly Defined Independence**
 - Works independently within broad policies and objectives
 - Situations may involve vague or unstructured aspects
 - Detail generally not reviewed at higher level
9. **Policy Action**
 - Takes full responsibility for actions of entire organization within policy limits
 - Approval not required for majority of actions
 - May involve collective policy setting as in meetings of elected officials
10. **Policy Setting**
 - Independent decisions on policy matters
 - Generally no review of actions of decisions
 - Collective policy setting done in private



FACTOR 6

RESPONSIBILITY FOR BUDGETS AND FUNDS

This factor measures the responsibility of the job for developing and controlling a budget as well as direct control of moneys or funds.

This factor is presented in a matrix. The vertical descriptions describe activities and controls related to developing and influencing the budget as well as the responsibility for spending, investing and controlling money and/or funds. The descriptions listed below describe the type of control and influence over the actions described in the vertical column.

Reference to section and department are relative terms to be interpreted within the organizational context.

TYPE OF ACTIVITY OR CONTROL

A. SPENDING RESPONSIBILITY

- Makes budget suggestions
- May assemble portions of budget
- Purchases within budget limitations

B. BUDGET INFLUENCING

- May provide analyzed data and information on a regular basis for others to make decisions
- Sectional budget preparation
- May include total budget assembly

C. BUDGET ADVICE

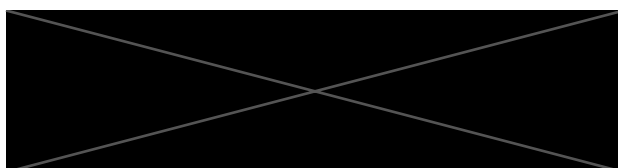
- May provide specialist financial control or budget advice on a regular basis to senior management
- Total departmental budget preparation and control

D. SHARED CONTROL

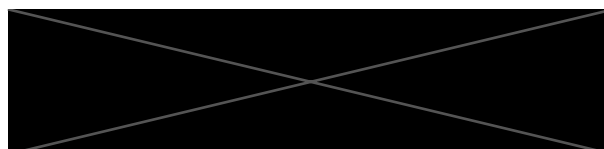
- Primary responsibility with one other position to take action or control major variables that determine results on an ongoing basis

E. PRIMARY

- Sole responsibility for activities, variables and resources directly accountable for results



NATURE OF RESPONSIBILITIES	Degree	TYPE OF CONTROL				
		A	B	C	D	E
RESTRICTED CONTROL OR FINANCIAL RESPONSIBILITY <ul style="list-style-type: none"> ▪ May purchase small items with consent 	1					
SPENDING OR CASH CONTROL <ul style="list-style-type: none"> ▪ May purchase some supplies or items according to procedures or specified limits ▪ May have control and responsibility for amounts of cash 	2					
PRESCRIBED GUIDELINES FOR SPENDING OR INVESTING <ul style="list-style-type: none"> ▪ May purchase items as described with choice of supplier or substitution ▪ Generally limits well established ▪ Generally approves within assigned spending limits 	3					
CONTROLS AND SPENDING WITHIN DEPARTMENT BUDGET <ul style="list-style-type: none"> ▪ Monitors monthly budget and adjusts actions according to limits ▪ Cannot change budget once established and approved 	4					
CONTROL AND SPENDING INVOLVING SEVERAL DEPARTMENTS OR FUNCTIONS <ul style="list-style-type: none"> ▪ Financial controls and budgets involving several departments or functions of organization ▪ May invest within broad guidelines a portfolio of funds of the organization with responsibility for results 	5					
DIRECT BUDGET & FINANCIAL CONTROLS FOR ENTIRE ORGANIZATION <ul style="list-style-type: none"> ▪ Final accountability for budget and its control ▪ May invest within broad guidelines total funds of organization with responsibility for results 	6					
DIRECT INVESTMENT CONTROL FOR PORTFOLIO OF FUNDS OUTSIDE ORGANIZATION <ul style="list-style-type: none"> ▪ May have major portfolio of pension or other outside investor funds for investment and results ▪ Established portfolio of funds. 	7					



FACTOR 7

MENTAL EFFORT AND IMPACT

This factor measures the extent of loss to the organization or others resulting from a single error in judgement or attention. This includes responsibility for material, accuracy and overall judgement in a variety of situations, including attention required to ensure safety of others.

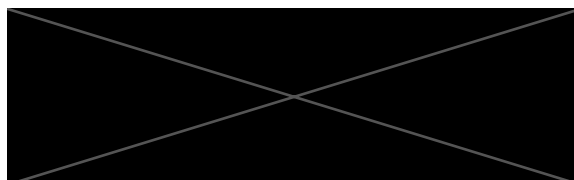
Impact of errors in judgement or incorrect recommendations, decisions or actions are evaluated in this factor.

Mental effort refers to the degree of sensory attention required to perform the job. This includes touch, sight, hearing, smelling and tasting. Care should be taken to consider the frequency, duration and intensity of attention required by the job.

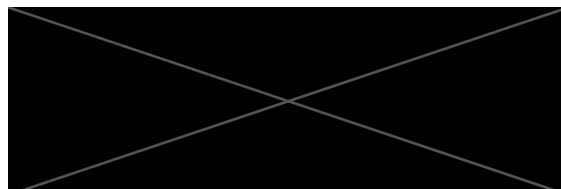
Where both error in judgement and attention apply to a job, select the highest applicable factor level.

Note: Sense of touch does not include dexterity. This is measured in Factor 11.

Factor Level	Description of Type And Impact of Errors
1.	Requires Some Attention to Avoid Errors <ul style="list-style-type: none">▪ Errors would have only minor effects such as minor delay, minor waste of supplies or slight damage▪ Almost all work subject to verification or check, by machine or others▪ Normal care required to prevent injury to others
2.	Requires Ordinary Attention and Accuracy to Avoid Errors <ul style="list-style-type: none">▪ Errors might cause damage or additional effort or expense▪ Corrections require work of others to correct▪ Errors generally discovered when work is checked or in succeeding steps▪ Regular, attentive care required to prevent injury to others
3.	Requires Close Attention to Avoid Errors <ul style="list-style-type: none">▪ Requires attention often involving more than one of the senses for part of work period▪ Errors could cause equipment damage or material waste for significant periods▪ Errors may cause significant delays in related succeeding operations▪ Errors may be caused by misinterpretation of data, instruments or equipment▪ Considerable, regular care required to prevent injury to others▪ Errors in judgement usually confined to department or section or have little effect on service to public/client, production or financial costs
4.	Requires Considerable Attention of Long Duration to Avoid Errors <ul style="list-style-type: none">▪ Considerable alertness, generally involving more than one sense required for most of work period▪ Constant, regular attention and care required to prevent injury to others▪ Errors in judgement usually confined to organization and have limited effect



Factor Level	Description of Type And Impact of Errors
5.	<p data-bbox="388 285 1403 380">Errors in Judgement in a Normally Specialized or Technical Environment Where Errors May Go Undetected for Considerable Period or Until the Activity is Complete</p> <ul data-bbox="436 386 1378 512" style="list-style-type: none"> <li data-bbox="436 386 1378 449">▪ Work is generally in a specialized field where others in the organization have little knowledge or understanding with relatively no check <li data-bbox="436 455 1378 512">▪ Errors would result in costly re-working or major breakdowns or material shortage
6.	<p data-bbox="388 554 1187 579">Errors in Judgement Could Affect the Entire Organization</p> <ul data-bbox="436 590 1403 680" style="list-style-type: none"> <li data-bbox="436 590 1403 680">▪ Errors could result in loss of time/resources or significant embarrassment to the organization with limited impact on public image through some negative media attention
7.	<p data-bbox="388 722 1435 816">Errors in Judgement Could Cause Serious Significant Losses to the Organization Generally in Terms of Identifiable Customer, Public or Internal Relations</p> <ul data-bbox="436 823 1419 953" style="list-style-type: none"> <li data-bbox="436 823 1419 886">▪ Effects of errors, all or partial encompassing of total customer, public or external relations <li data-bbox="436 892 1419 917">▪ Results in terms of substantial financial costs or serious impact on public safety <li data-bbox="436 924 1419 953">▪ Errors require intervention at the highest level to deal with repercussions
8.	<p data-bbox="388 995 1378 1052">Errors in Judgement, Decisions or Actions Would Result in Substantial Losses to the Organization</p> <ul data-bbox="436 1058 1435 1157" style="list-style-type: none"> <li data-bbox="436 1058 1435 1083">▪ Long term affect on the entire organization would be caused by errors at this level <li data-bbox="436 1089 1435 1157">▪ May involve preparation of recommendations and data on which important policy or long range decisions are based
9.	<p data-bbox="388 1199 1338 1255">Errors in Judgement, Decisions or Actions Would Have a Long Term Continuing Effect on the Entire Organization</p> <ul data-bbox="436 1262 1317 1285" style="list-style-type: none"> <li data-bbox="436 1262 1317 1285">▪ Judgement errors generally concern major policies and long range plans



FACTOR 8

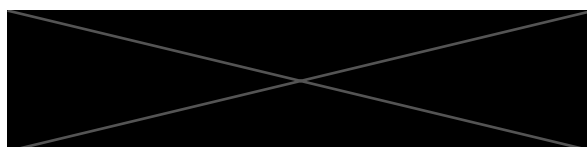
RESPONSIBILITY FOR CONFIDENTIAL INFORMATION

This factor measures the extent to which the duties and responsibilities of the job include working with and the use and safeguarding of confidential or sensitive material and data. Consideration is given to the discretion, caution and care required in the use and protection of the information.

When using this factor consider:

- The opportunity for disclosure of the information and the detail and completeness of the data used
- The contact with other organizations that would provide the opportunity for disclosure
- The client organization may wish to customize this factor with applicable specific examples

Factor Level	Type and Level of Confidential Information
1.	Negligible Use of Confidential Data <ul style="list-style-type: none">▪ May have incidental contact with or knowledge of confidential or sensitive data
2.	Occasional Work Where Confidential Data is Used or Work with Confidential Data of a Limited Nature <ul style="list-style-type: none">▪ Access to personnel records of a group of employees
3.	Work with Limited Pieces of Confidential Data <ul style="list-style-type: none">▪ On its own, if disclosed; would not normally be harmful
4.	Occasional Work with Confidential Information <ul style="list-style-type: none">▪ Disclosure would have adverse affect either externally or internally
5.	Regular Work with Confidential Information <ul style="list-style-type: none">▪ Disclosure could have short-term harmful effect▪ Example: Total Payroll Data
6.	Consistent Work with Confidential Information <ul style="list-style-type: none">▪ Disclosure would have serious long-term effect▪ Example: Total Human Resource Records▪ Parts of Health Care Records
7.	Constant Work with Confidential Information <ul style="list-style-type: none">▪ Disclosure would result in significant monetary loss, loss of goodwill or definite legal action▪ Example: Total Health Care Records
8.	Major Part of Job Involves Working with Most Sensitive or Secret Information
9.	Works Regularly with Information Classified As Secret or Top Secret



FACTOR 9

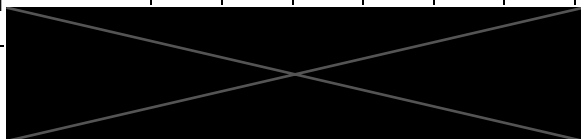
RESPONSIBILITY FOR LEADERSHIP, SUPERVISION & FUNCTIONAL ADVICE

This factor measures the responsibility for leadership, supervision or management functions over others within the organization. It also measures staff and/or functional responsibilities for co-ordination of work, functional control, and staff advice. These types of functions are generally found in technical, project and staff positions.

NOTE: When both line and functional operations exist in the same job, choose the highest applicable level.

Number of Employees Supervised (F.T.E.'s)

Factor Level	A	B	C	D	E	F	G	H	I	J	K	L
	0-2	3-12	13-35	36-60	61-100	101-180	181-300	301-450	451-600	601-1000	1001-2000	2000+
1. NO LEADERSHIP RESPONSIBILITY <ul style="list-style-type: none"> ▪ May show others how to do own job 												
2. MAY SHOW OTHERS HOW TO PERFORM CERTAIN PROCEDURES <ul style="list-style-type: none"> ▪ Does not include showing others how to do own job ▪ May give incidental guidance to other jobs 												
3. LEAD HAND (GROUP LEADER) <ul style="list-style-type: none"> ▪ Most of time spent actually performing job generally at a more advanced level than other employees ▪ Often trains new employees ▪ Periodically may assume supervisory responsibilities 												
4. DAY-TO-DAY LEADERSHIP OF SMALL WORK UNIT <ul style="list-style-type: none"> ▪ May be second in-charge of work unit ▪ Ensures flow of work ▪ Often a working supervisor/leader ▪ Assigns work to others in unit ▪ May participate in performance appraisals of others in work unit ▪ May occasionally co-ordinate outside contractors ▪ May co-ordinate work or activities of small independent groups / project teams without direct authority over them 												
5. DIRECT DAY-TO-DAY LEADERSHIP <ul style="list-style-type: none"> ▪ First line supervisor/leader ▪ Most of time spent in supervisory leadership activities ▪ Assigns, checks, monitors work of unit ▪ Ensures work flow maintained ▪ Performs performance appraisals and/or ▪ Functional advice provided on regular basis ▪ Often co-ordinates outside contractors or independent 												

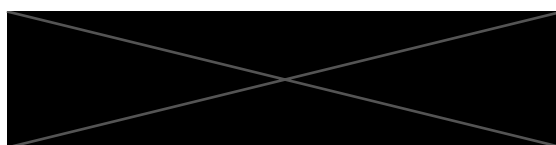


Number of Employees Supervised (F.T.E.'s)

	A	B	C	D	E	F	G	H	I	J	K	L
Factor Level	0-2	3-12	13-35	36-60	61-100	101-180	181-300	301-450	451-600	601-1000	1001-2000	2000+
project teams												

Number of Employees Supervised (F.T.E.'s)

	A	B	C	D	E	F	G	H	I	J	K	L
Factor Level	0-2	3-12	13-35	36-60	61-100	101-180	181-300	301-450	451-600	601-1000	1001-2000	2000+
6. MANAGEMENT AND LEADERSHIP OF LARGE WORK UNIT												
<ul style="list-style-type: none"> ▪ Often through supervisors/leaders ▪ May be department performing single function ▪ May manage several work units in diverse locations and/or ▪ Co-ordinates many outside contractors on an ongoing basis 												
7. DIRECTION OF LARGE WORK UNIT												
<ul style="list-style-type: none"> ▪ Delegated authority through several subordinates ▪ Leadership responsibilities varied and intricate ▪ Provides advice and guidance to top management on a regular basis and/or ▪ Complex functional control of a major project 												
8. DIRECTION AND CONTROL OVER TWO OR MORE MAJOR FUNCTIONS												
<ul style="list-style-type: none"> ▪ Co-ordinates operations of primary importance and/or ▪ Provides advice and counsel to top management on a continual basis and/or ▪ Major functional control responsibilities that relate to all aspects of organization 												
9. MANAGEMENT AND POLICY DIRECTION OVER MAJOR ASPECTS OF ORGANIZATION												
<ul style="list-style-type: none"> ▪ Organizes and establishes long term programs and objectives and ensures compliance 												
10. POLICY AND MANAGEMENT DIRECTION OVER ENTIRE ORGANIZATION												



FACTOR 10

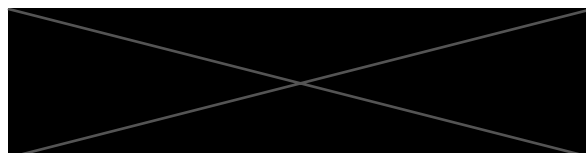
RESPONSIBILITY FOR INFLUENCING OTHERS (CONTACTS)

This factor measures the responsibility of the job for communicating with and influencing others both inside and outside the organization. This does not refer to supervision (this was measured in Factor 9).

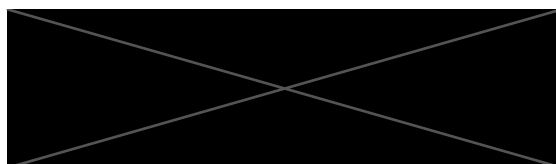
If contacts involve persons both inside and outside the organization, select the highest applicable factor level.

NATURE OF CONTACT

- A. Tact and courtesy required. To give, obtain and/or exchange information of short duration generally requiring little discussion.
- B. To give, obtain and/or exchange routine information or decisions requiring general discussion, and explanation to ensure understanding – includes first contact or exposure to emotionally charged situations.
- C. To give, obtain and/or exchange, and/or discuss information or decisions requiring discussion or explanation to ensure full understanding. Tact, self-control and persuasiveness are required to avoid possible friction or the creation of an unfavourable or unco-operative impression.
 - May include dealing with emotionally charged situations on occasional basis where a resolution is required.
 - Regular sales situations
- D. To give, obtain and/or exchange, and/or discuss information or decisions where different points of view may be expected. May require considerable explanation, clarification and interpretation of data. Requires tact, discretion and persuasion to obtain willing action or consent from other parties.
 - May involve dealing with emotionally charged situations on a regular basis where a resolution is required
 - Sales situations requiring complex negotiations
- E. To give, obtain and/or exchange, and/or discuss information or decisions in potentially controversial or sensitive situations. Strong communication skills are required to ensure that suitable agreements or decisions are reached on behalf of employer.
- F. To give, obtain and/or exchange, and/or discuss information or decisions where there is potential for significant long-term impact on employer's operation. The highest level of communication skills is required to ensure that highly significant contacts are handled with the utmost diplomacy.



SCOPE OF PERSONS CONTACTED	Degree	NATURE OF CONTACT					
		A	B	C	D	E	F
REGULAR CONTACTS WITH IMMEDIATE WORKING ASSOCIATES	1						
REGULAR INSIDE CONTACTS ▪ Throughout department <u>and/or</u> OCCASIONAL OUTSIDE CONTACTS ▪ Public, clients, sales representatives, customers and publics being served	2						
REGULAR INSIDE CONTACTS ▪ Throughout entire organization <u>and/or</u> REGULAR OUTSIDE CONTACTS ▪ By correspondence and/or phone, with public, clients, sales representatives and publics being served	3						
REGULAR INSIDE CONTACTS ▪ Throughout organization primarily at management and senior levels <u>and/or</u> REGULAR OUTSIDE CONTACTS ▪ Generally in person with public, clients, customers, sales representatives and publics being served	4						
REGULAR OUTSIDE CONTACTS ▪ At most senior levels of governments or outside organizations	5						
CONSTANT OUTSIDE CONTACTS ▪ At senior levels of outside organizations ▪ Primary function of position	6						



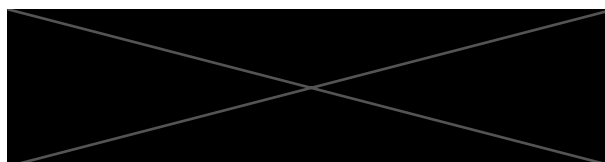
FACTOR 11

PHYSICAL SKILL AND EFFORT

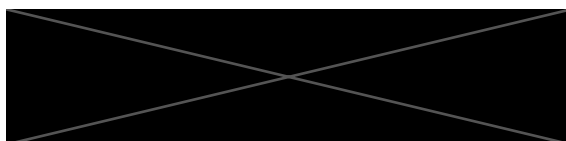
This factor measures both the physical skill (co-ordination of movement, precision and dexterity) and effort (physical positions and activities that generally produce fatigue) necessary to perform the job.

PHYSICAL SKILLS

- A. Simple, often easy muscular movements. No requirements for speed for periods of time, over ½ hour per day—includes use of computers to manipulate or retrieve data.
- B. Some degree of skill required. Regular use of tools or office machines requiring co-ordination and speed.
- C. Constant speed and dexterity over most of working day. Often includes constant use of automatic tools and machines—little choice in operation.
- D. Requires skill and dexterity for accuracy involving rapid movements—typical of some assembly operations. May involve highly skilled operations for short time periods.
- E. Requires constant dexterity for highly skilled precise operations over major portions of work period—requires energy, dexterity and precision—typical of some assembly operations.



PHYSICAL EFFORT	Degree	PHYSICAL SKILLS				
		A	B	C	D	E
ACTIVITIES NORMALLY DO NOT PRODUCE FATIGUE <ul style="list-style-type: none"> ▪ Sitting, standing, regular movement with choice ▪ Moderate visual demands involve reading 	1					
OCCASIONAL PERIODS OF PHYSICAL STRAIN INVOLVING SOME FATIGUE <ul style="list-style-type: none"> ▪ Sitting, standing, regular movement without choice over moderate time periods ▪ May involve moving average weight materials which causes some fatigue ▪ Regular work with light tools and equipment ▪ Visual demands involve regular eye strain 	2					
MODERATE PHYSICAL EXERTION CAUSING FATIGUE <ul style="list-style-type: none"> ▪ Sitting or standing in fixed positions over long periods ▪ Constant standing and active movement ▪ Lifting, pulling, pushing of heavy or awkward objects regularly ▪ Regular use of heavy tools or materials ▪ May require climbing or walking over rough ground for moderate time periods on a regular basis ▪ Visual demands involve constant eye strain 	3					
STRENUOUS WORK INVOLVING CONSIDERABLE EFFORT AND FATIGUE <ul style="list-style-type: none"> ▪ Working in cramped or uncomfortable positions for moderate time periods ▪ Considerable effort on a regular basis but not over sustained periods 	4					
SUSTAINED HEAVY LABOUR OR WORKING IN CRAMPED POSITIONS OVER CONSIDERABLE PERIODS <ul style="list-style-type: none"> ▪ Generally results in major fatigue ▪ May involve lifting and moving substantial weights 	5					



FACTOR 12

DISRUPTION TO LIFESTYLE AND WORKING CONDITIONS

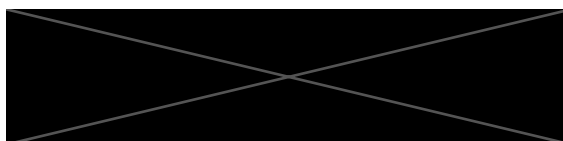
This factor measures disruptive elements and work pressure in the work and work environment that produce mental stress and work pressure. It also measures elements in the physical work environment that make it unpleasant, may cause increased health problems and the risk of accident.

Work environment consists of: noise, odors, heat, cold, vibration, dirt, oil, chemicals, fumes, severe weather, disease, radiation, bodily fluids, etc. Also consider the possibility of work place injuries and occupational health issues under working conditions.

When examining both disruption to lifestyle, work pressure and working conditions always consider frequency, duration and intensity of exposure.

WORKING CONDITIONS / WORK ENVIRONMENT

- A. COMFORTABLE CONDITIONS—May be comparable to standard office. May have walls or barriers. May be irritants such as telephone sounds and office temperature controls. Little chance of injury or accident.
- B. OPEN ENVIRONMENT—Open exposure to background noises. A chance of injury or occupational health problems. Occasional exposure to 1 or 2 disagreeable elements.
- C. SOME EXPOSURE TO DISAGREEABLE CONDITIONS—Could be outside work in protective environment. Regular exposure to 1 or 2 disagreeable elements. Chance of injury and occupational health problems.
- D. EXPOSURE TO DISAGREEABLE CONDITIONS—Regular exposure to 2 or 3 disagreeable elements. Possibility of injuries and occupational health problems. May be regular outside work.
- E. DISAGREEABLE CONDITIONS—Continuous exposure to disagreeable elements. May be continuous outside work in all weather elements. Exposure to serious injury and occupational health problems. Constant exposure to 2 or 3 disagreeable conditions.
- F. SEVERE CONDITIONS—Very unpleasant working conditions. Possibility of fatal accidents and incapacitating occupational disease.
- G. EXTREME CONDITIONS—Constant exposure to very disagreeable conditions. Relief must be provided frequently. Distinct possibility of fatal accidents and incapacitating occupational disease.



LEVEL OF DISRUPTION TO LIFESTYLE	Degree	WORKING CONDITIONS/ WORK ENVIRONMENT						
		A	B	C	D	E	F	G
<p>NORMAL DISRUPTION</p> <p>Work produces nominal disruptive elements but intensity, frequency and duration are not considered severe enough to produce abnormal levels of anxiety, tension or disruption of normal life-style</p> <p>Examples:</p> <ul style="list-style-type: none"> ▪ Normal pressure for production and completion of work ▪ Normal interruption by others or equipment distraction ▪ General control over pace of work ▪ Generally works routine hours or paid voluntary overtime ▪ May have some evening work 	1							
<p>SOME DISRUPTION</p> <p>Work produces some disruptive elements in most workers to some degree generally by disruption to lifestyles considered to be normal May involve constant caring for or nurturing others, multiple demands, boredom or work pace.</p> <p>Examples:</p> <ul style="list-style-type: none"> ▪ Regularly works non-routine hours (Saturdays, evenings) ▪ Sometimes works rotating shifts ▪ Works in an on-call environment ▪ Constantly caring for children, sick or disabled people ▪ Work pace may be constantly machine controlled ▪ Often works in emotionally charged situations requiring resolution ▪ Multiple role demands by a requirement to provide high quality work within time demands by many people ▪ Regularly travels overnight away from home 25% to 50% of time 	2							
<p>MODERATE DISRUPTION</p> <p>Work produces moderate disruptive elements in most workers by either intensity, frequency and/or duration of stressful elements</p> <p>Examples:</p> <ul style="list-style-type: none"> ▪ Regularly works rotating shifts ▪ Regularly works in emotionally charged situations requiring resolution ▪ Constantly works with injured or disabled people in crisis situations ▪ Regularly travels overnight away from home 50% to 75% of time 	3							
<p>SUBSTANTIAL DISRUPTION</p> <p>Work produces substantial disruptive elements in all workers to a level that will normally produce eventual "burn-out"</p> <p>Examples:</p> <ul style="list-style-type: none"> ▪ Regularly works with dying or those experiencing extreme human suffering ▪ Often works in hostile and violent environments caused by others ▪ Often works in isolated places far from home 	4							
<p>EXTREME DISRUPTION</p> <p>Work produces disruptive elements to a degree that relief is normally required often to prevent mental "burn-out".</p> <p>Example:</p> <ul style="list-style-type: none"> ▪ Work in isolated conditions or hostile environment far from home for long periods 	5							

