

Job Evaluation Process

June 1, 2018
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ALL dates are considered TENTATIVE, but the parties agree to make every effort to complete the work outlined within anticipated timelines.

Stage 1: JCQ Completion (June – September 2018)

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and manager completing the JCQ, even in circumstances where the most recent iteration of the position summary is out-of-date.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

Dispute Resolution Mechanism for Stage 1

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

Appendix "A"

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

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

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

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

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

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

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

Dispute Resolution Mechanism for Stages 2 and 3

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

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

Appendix "A"

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

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

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

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

Appendix "A"

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

Dispute Resolution Mechanism for Stage 5

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

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

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

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

Processes for Employees on Leave:

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