

# **Job Evaluation Project Terms of Reference**

**Provincial Joint Job Evaluation Steering Committee**

May 9, 2016

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## Article 1 Purpose

- 1.1 This document sets out the Terms of Reference to be followed by BCPSEA and the Unions for implementing the Job Evaluation Program as per Article 11 Standardized Job Evaluation Study of the June 7, 2014 Provincial Framework Agreement (Framework Agreement).
- 1.2 The Parties have agreed to establish a Joint Job Evaluation Program for the purposes of implementing and maintaining a standardized method of measuring and classifying jobs for the BC Public School Districts, which may include a regional or local approach.
- 1.3 The Parties have agreed to base the project on the CUPE gender-neutral Joint Job Evaluation Plan (JE Plan) to measure jobs. The JE Plan is based on these four factors:
  - Skill
  - Effort
  - Responsibility
  - Working Conditions
- 1.4 The Steering Committee will ensure the JE Plan and program maintains the principles of Pay Equity.

## Article 2 Joint Job Evaluation Steering Committee (Steering Committee)

- 2.1 The Steering Committee terms of reference will be those adopted by the Committee Jan. 13, 2016.
- 2.2 Training, as required, will be provided for members and alternates on the Committee by a mutually agreed facilitator(s).
- 2.3 Administrative and consultation support services to the Committee will be funded in accordance to Article 12 Job Evaluation Fund of the Framework Agreement. Any person performing these functions may attend meetings for the purpose of providing administrative and consultation support and will not be a member of the Committee.
- 2.4 The Steering Committee will operate by consensus and agree that an earnest effort will be made to resolve any disputed matters regarding job ratings, job descriptions and job factsheets. The Steering Committee may in some instances agree to have advisors jointly resolve matters in dispute. In any case the Steering Committee may refer disputes to the Parties, as per Article 11 Standardized Job Evaluation Study of the Framework Agreement.
- 2.5 Role of the Steering Committee
  - 2.5.1 The Steering Committee will have overall responsibility for all phases of developing and implementing the Joint Job Evaluation Project.

- 2.5.2 The Steering Committee will establish the process to implement the Gender Neutral Job Evaluation Program:
- a) Establish the roles and responsibilities of the consultants and timeframes for the completion of the work.
  - b) Customize the job evaluation plan, weightings, questionnaire, job data collection process, Provincial Job Description (PPD) format, Job Factsheets, terms of reference, implementation of trial process, maintenance process, and any related forms.
  - c) Develop a communication strategy and issue joint communications throughout the project.
  - d) Develop the data collection process to collect job content information (e.g. from multiple incumbent positions).
  - e) Oversee the work of the Consultants and recommend the best methodology to resolve deadlock issues.
  - f) Recommend to the Parties one local in each of the seven established CUPE regions to pilot the JE Program.
  - g) Report key milestones to the Parties during development of the project and report final results and recommendations.
  - h) Approve the final Provincial Job Descriptions (PJDs), Job Factsheets, the Job ratings and Job Description Matches.

## Article 3 Consultants

- 3.1 Two job evaluation consultants will be engaged by the Steering Committee, one by the Union and one by the Employer to:
- 3.1.1 Create PJDs to adequately reflect the work of current jobs for all British Columbia School Districts.
  - 3.1.2 Compile and create Job Factsheets for each PJD.
  - 3.1.3 Rate PJDs and record rating results and rationales on Rating Sheet for each PJD.
  - 3.1.4 Assign School District current job descriptions to the best fit PJD.
  - 3.1.5 Determine which jobs and positions to survey and what other data analysis is required.
  - 3.1.6 Recommend the final PJDs and the ratings to the Steering Committee.
- 3.2 The Steering Committee will provide the two consultants the resources and job evaluation information needed to undertake the project.

- 3.3 The two consultants will present the completed PJDs, Job Factsheets, Rating Sheets and Job Description Matches to the Steering Committee and facilitate a review process to enable the committee to adequately check and approve the documents.
- 3.4 The two consultants will provide project status reports at Steering Committee meetings or upon request.
- 3.5 The two consultants must attempt to reach consensus. Any matters unresolved by the Consultants will be forwarded to the Steering Committee.

## Article 4 Provincial Jobs Descriptions (PJDs)

- 4.1 PJDs describe the overall scope and level of responsibility and the typical duties by which jobs are distinguished under the job evaluation program.
- 4.2 PJDs also state the level of qualifications appropriate for the scope and level of responsibility specified in the PJDs.
- 4.3 PJDs are used to match a range of current School District jobs that are of comparable value.
- 4.4 PJDs may encompass a variety of different job descriptions from various School Districts that are comparable in value, function, scope of work and level of responsibility.
- 4.5 PJDs are rated using the Job Evaluation Plan to establish the total point value rating and thus relative value of jobs.
- 4.6 Format of PJDs
  - 4.6.1 PJD Title – Each PJD is identified by a PJD title.
  - 4.6.2 PJD Summary – Briefly describes the overall core purpose and functions of the job.
  - 4.6.3 PJD Duties and Responsibilities – A listing of the primary duties and responsibilities of the job being performed at the scope and level of responsibility of the job. The listing of duties identified on a PJD is not intended to be exhaustive or all-encompassing.
  - 4.6.4 PJD Qualifications – The qualifications stated in a PJD reflect the level of education and/or training and the experience appropriate to the scope and level of responsibility to adequately perform the job. Different and equivalent qualifications may be required for jobs that are matched to the PJD to meet the unique work organization in the School District.

## Article 5 Job Factsheets

- 5.1 A Job Factsheet is an agreed to set of detailed facts about each job compiled from job analysis, which may include questionnaire surveys, interviews, observations and other research compiled by the Consultants.
- 5.2 The scope and level of responsibility described in a PJD must reflect the agreed to facts as described in a Job Factsheet.
- 5.3 The same Job Factsheet format will be used for all jobs.

## Article 6 Data Collection

- 6.1 For the purposes of creating PJDs and Job Factsheets, and to distinguish jobs or to ensure jobs are of comparable scope and level of responsibility, the Consultants will do job analysis:
  - a) collect and group current job descriptions from each School District;
  - b) survey a province wide sample of incumbents for each identified PJD, using an agreed to Job Evaluation Questionnaire and/or supplement information using existing and already completed questionnaires where available from School Districts; and
  - c) may gather other information through interviews, observations and any other appropriate research method.
- 6.2 The following data will be collected for each School District:
  - a) all current job descriptions;
  - b) data list of all jobs to include: Job title, SD job number, and most current wage rate; and
  - c) may, where appropriate and available, collect existing and already completed questionnaires.

## Article 7 Matching Jobs and Distribution of Results

- 7.1 Upon completion of all PJDs and Job Factsheets, the School District's current job descriptions will be matched by the Consultants to the best fit PJD.
- 7.2 Upon completion of matching all School District's current job description the Steering Committee will distribute to each affected School District and Local Unions a list of the School District's current job descriptions showing the assigned PJD along with the SD job number where available.
- 7.3 The School District's Joint Job Evaluation Committee will review the School District's job descriptions to confirm matches to the PJDs, as provided in 8.2.
- 7.4 All PJDs and Job Factsheets will be available for distribution.

## Article 8 Job Match Reconsideration

- 8.1 School District's Joint Job Evaluation Committee does not believe the current job(s) is appropriately matched to the proper PJD they may complete a Job Match Reconsideration Form to be submitted to the Steering Committee.
- 8.2 The Job Match Reconsideration Form will require a rationale for why the PJD is not the appropriate match.
- 8.3 Based on the information provided in the Job Match Reconsideration Form the Steering Committee and/or Consultants will decide if a full review of the job is required. Where the Steering Committee believes a review is warranted they will determine what other information is needed to adequately complete the review.
- 8.4 The Steering Committee's review may result in no change, matching the job to a different PJD or establishing a new PJD to adequately reflect the scope of work and level of responsibility of the job.
- 8.5 Where the Steering Committee has reached a consensus decision on job matching of job descriptions to PJDs then following the completion of the reconsideration process their decision is final.

## Article 9 PJD Ratings

- 9.1 The Steering Committee and Consultants will establish a recommended point weighting system for the Job Evaluation Plan.
- 9.2 PJDs will be evaluated by the Consultants based on the finalized scope and level of responsibility as described in the PJD and the Job Factsheet.
- 9.3 In the application of the Job Evaluation Plan the following general rules will apply:
  - a) the content of the position, and not the performance of the incumbent(s) that is being rated.
  - b) PJDs will be evaluated without regard to existing wage rates.
  - c) each PJD will be rated relative to and consistent with all other jobs.
  - d) the four factors and sub-factors must have an impact on all jobs being rated.
- 9.4 PJDs will be rated at the appropriate degree in each subfactor by comparing the specific requirements of the job to the subfactor definition and the description of each degree level consistent with any guidelines and Notes to Raters set out in the JE Plan and/or its attachments.
- 9.5 Rating decisions of PJDs will include a sore-thumbing process to ensure consistency in rating decisions.
- 9.6 All ratings will be reviewed and finalized by the Steering Committee.

## Article 10 Pilot Project

- 10.1 The Steering Committee and consultants will choose the seven pilot districts.
- 10.2 The Steering Committee will send PJDs, Job Factsheets, Rating Sheets and JD Matches to the Pilot School Districts and Unions.
- 10.3 The Pilot School District's Joint Job Evaluation Committees will review the PJD Ratings and may seek a review where they believe a PJD is inappropriately rated, as provided in Article 10.4.

### 10.4 PJD Rating Reconsideration

- 10.4.1 If, within thirty (30) days of distribution of PJDs Rating Sheet, the School District's Joint Job Evaluation Committee does not believe a PJD is appropriately rated they may complete a Rating Reconsideration Form to be submitted to the Steering Committee.
- 10.4.2 The Rating Reconsideration Form will require a rationale for why the rating for any subfactor is considered inappropriate.
- 10.4.3 Based on the information provided in the Rating Reconsideration Form the Steering Committee and/or Consultants will review the ratings. The Steering Committee will determine if further information is needed to adequately complete the review.
- 10.4.4 The Steering Committee's review may result in no change or a revised rating of any of the PJD subfactor ratings.
- 10.4.5 Where the Steering Committee has reached a consensus decision on the PJD rating following the completion of the reconsideration process their decision is final.

## Article 11 Analysis of Pilot Program

- 11.1 The Consultants will prepare provincial, regional and/or School District analysis of the job evaluation program and wage rate adjustments and structures.
- 11.2 After completion of the Job Evaluation Program the Steering Committee will report the final results to the Parties, including:
  - a) All PJDs, Job Factsheets and Rating Sheets.
  - b) Report the hierarchy of all newly created PJDs in descending order of total points.
  - c) Reports of all matching School District's job descriptions with the new PJDs and Job Factsheets (in descending order based on the matching PJD) including the most current wage rate and any other pertinent information.
  - d) All documents composing the Job Evaluation Program (JE Plan, JE Project Terms of Reference, Questionnaire, Weighting Report and JE Forms).



- e) Recommend Provincial, Regional or School District wage structures and/or wage adjustments, where appropriate, based on the principles and best practices of implementing a job evaluation program.
- 11.3 The Steering Committee will draft a Provincial Job Evaluation Implementation Process for recommendation to the Parties to guide the roll-out of the job evaluation program.
- 11.4 The Steering Committee will draft a Provincial Job Evaluation Maintenance Agreement for recommendation to the Parties.

## Article 12 Conclusion and Implementation

- 12.1 The Steering Committee may change these Terms of Reference and appendices by consensus decision.
- 12.2 The Steering Committee will report its final recommendations to the Parties for negotiating the rollout of the Provincial Job Evaluation Program.

BCPSEA Representatives	UNION Representatives
<i>Heanne Bowes</i>	<i>[Signature]</i>
<i>[Signature]</i>	<i>J. Kim</i>
<i>[Signature]</i>	<i>[Signature]</i>
<i>Joel Strain</i>	<i>[Signature]</i>
Date: <i>May 9/16</i>	Date:

## Appendix 1 – Glossary of Terms

<b>BCPSEA</b>	British Columbia Public School Employers' Association
<b>Collective agreement</b>	The collective agreement currently in effect between each School District and each Local Support Staff Union
<b>Degree level</b>	The actual measurement level within each subfactor.
<b>Duty</b>	Is made up of a number of tasks.
<b>Factors</b>	The four major criteria used to measure jobs are skill, effort, responsibility and working conditions.
<b>Framework Agreement</b>	Provincial Framework Agreement June 7, 2014 is an agreement negotiated by BCPSEA and the Unions for inclusion in the collective agreements between Local Support Staff Unions who are members of the K-12 Presidents' Council and Boards of Education.
<b>Gender-neutral</b>	Any practice or program which does not discriminate between men and women.
<b>Increment</b>	One of a series of fixed rates on a salary range.
<b>Incumbent</b>	An employee assigned to a job.
<b>Job factsheet</b>	An agreed to set of detailed facts about each job compiled from job analysis.
<b>Joint job evaluation steering committee</b>	The steering committee is made up of equal representatives from union and management and is responsible for establishing and implementation of the job evaluation program.
<b>New job</b>	A job which is added to the workforce that is sufficiently different from work currently being performed in the workplace that it cannot be assigned to an existing job.
<b>Pay grade</b>	A designated salary range within the salary schedule including increments, if any.
<b>Points</b>	The numerical expression assigned to each degree level within each subfactor.
<b>Position</b>	Is a collection of duties and responsibilities assigned to one person.

<b>Provincial Job Description (PJD)</b>	Provincial job descriptions may encompass a variety of different job descriptions from various School Districts that are comparable in value, function, scope of work, and level of responsibility. (Also, see Job description.)
<b>Rating</b>	The process of relating the facts contained in the job documents to the job evaluation plan and selecting the factor degree levels judged to be appropriate.
<b>Rating sheet</b>	Records the facts and rationale for the degree levels assigned to each subfactor for each job.
<b>Salary schedule</b>	A listing of job titles, point bandings and pay grades.
<b>Sore-thumbing</b>	The process of making an objective comparison of a rating decision made by the committee to previous rating decisions of similar and/or related positions. Comparisons may be performed by subfactors or total points.
<b>Subfactors</b>	Are components of the four major factors.
<b>Union</b>	The local Support Staff Unions are the recognized bargaining agents at each School District. "the Unions" is the K-12 Presidents' Council representing the local Support Staff Unions.
<b>Task</b>	A unit of work activity which forms part of a duty; one of the operations that constitute a logical and necessary step in the performance of a duty.
<b>Total points</b>	The sum of all points allocated to each job for all subfactors determined in accordance with the job evaluation plan.

