

*THE UNIVERSITY OF WESTERN
ONTARIO*

POINT-RATING JOB EVALUATION PLAN

for

OFFICE SUPPORT POSITIONS

OFFICE SUPPORT PLAN STRUCTURE

<u>No.</u>	<u>Factor</u>	<u>Minimum Points</u>	<u>Maximum Points</u>	<u>Factor Weight</u>	<u>No. Of Degrees</u>
I	Job Knowledge (a) Education (b) Experience	20	260	22.2%	45 (grid) (5) (9)
II	Initiative	10	100	11.1%	6
III	Complexity/ Judgement	10	100	11.1%	7
IV	Contacts	10	100	11.1%	5
V	Errors	10	100	11.1%	5
VI	Supervision (a) Scope (b) Character		100	11.1%	35 (grid) (5) (7)
VII	Effort/Demand	10	100	11.1%	4
VIII	Physical Environment	10	100	11.1%	5
8	TOTALS	85	960	99.9%	112

I JOB KNOWLEDGE

This factor measures the minimum knowledge required to permit an individual to learn and perform satisfactorily the work of a position. It consists of two Elements which must be considered together:

- A) EDUCATION: Measures the minimum level of preliminary formal education and/or specialized training considered necessary to do the work, and
- B) EXPERIENCE: Measures the total relevant work or career experience gained in previous working experience (including volunteer) in order to do the work, presuming the educational background identified under the first Element.

NOTES TO EVALUATORS

- A) EDUCATION:
1. Intended to assess the minimum educational background required.
 2. Refers to the requirements of the position only, and not the qualifications which the current incumbent happens to possess.
 3. Reference made to specific educational programs in the Degree definitions are intended as illustrative of a probable or common source and level of relevant formal training, and are not intended for interpretation in a restrictive sense.
- B) EXPERIENCE:
1. Considers the type and length of related work or career experience needed for satisfactory performance.
 2. Related previous experience is that which enables the accumulation of a body of knowledge (however obtained) essential for satisfactory performance of this position.
 3. This element also encompasses the learning or adjustment period in this position for a new employee.
 4. The points for this Element span 7 Degrees, although only 4 are described. An intermediate Degree may be selected if the Evaluator deems it to be most appropriate.

EDUCATION

<u>DEGREE</u>	<u>DESCRIPTION</u>
1	<u>Elementary Vocational:</u> Requires basic knowledge of arithmetic, spelling, grammar, etc., and simple manual skills (eg. keyboarding, book-binding, or other simple machines or equipment). Usually acquired through partial completion of high school and/or some elementary vocational training.
2	<u>Full Vocational:</u> Requires completion of secondary level education, either in an advanced program (OAC) to provide sound mathematical and English language skills as well as a general educational background sufficient to learn, understand and apply relevant University procedures, public liaison etc., or in a relevant (to the job under consideration), trade or commercial senior level program to provide specific training in such skills as word processing, book-keeping practices, simple statistical methods, basic mechanical drawing, etc.
3	<u>Supplemented Vocational:</u> Requires completion of secondary level education, as well as another year of further study or training in a specific field related to the job under consideration, such as completion of a one year Westervelt secretarial diploma, first year CGA Program, etc.
4	<u>Specialized Training/Education:</u> Requires completion of a two or three year post-secondary program in a specific occupational field relevant to the job under consideration (eg. business programs), partial completion of a longer training program (eg. 3rd Year CGA), etc. or a more general educational background such as that provided by a General Bachelors degree or an Honours degree in a discipline not directly related to the job under consideration.
5	<u>Advanced Training/Education:</u> Requires completion of a program which will provide an advanced or detailed knowledge in a field directly related to the job under consideration, such as is normally provided by an Honours degree in a closely related discipline, completion of a CGA program, or completion of specialized industrial or academic training programs beyond those described in Degree No. 4.

EXPERIENCE

DEGREE

DESCRIPTION

- A. Minimal: Generally involves previous work exposure through part-time or summer jobs in either a related area or otherwise (although even this is not mandatory to some jobs). [eg. on-the-job learning would likely take less than three months].
- (B)
- C. Generally Related: normally requires a year or two of previous work experience which enable exposure to some of the facets of the job under consideration in order to develop or refine transportable knowledge or skills (eg. bookkeeping practices, calculations, word processing skills, general office procedures, etc.). [eg. On-the-job learning of 3 to 6 months is usual].
- (D)
- E. Directly Related: Normally requires two or more years of previous experience in which the transportable skills acquired are directly applicable to the job under consideration (eg. as secretary to a principal or group of principals in a related field, specialized experience in Payroll, Insurance Claims, may supervise other jobs in a related function, etc.). [eg. adjustment time may take 6 to 12 months to accommodate jobs with annual cycles].
- (F)
- G. Seasoned: Normally requires a general knowledge of relevant University policies, procedures, deadline, etc. pertinent to own unit, as well as the impact on other units of actions taken, where tasks/responsibilities have definite annual cycles and the knowledge can only be acquired by previous experience of up to three years in progressively more responsible appointments within that unit (or related area of the University). [eg. the learning time is at least one year].
- (H)
- I. Specialized: Normally requires a general knowledge of relevant University policies, procedures, departmental/unit objectives, plans, tec. (including the need to recognize and react to sensitive situations, unwritten or informal practices/policies), where some tasks/responsibilities are more project oriented and the knowledge NEEDED can only be acquired by previous experience in excess of 5 years in progressively more responsible appointments within the University.

KNOWLEDGE POINTS

EDUCATION	Elementary 1	Full 2	Supplemented 3	Specialized 4	Advanced 5
EXPERIENCE					
A. Minimal	20	35	50	75	100
B.	25	40	55	80	110
C. General	30	45	60	90	120
D.	40	55	70	100	135
E. Direct	50	65	85	115	150
F.	65	85	105	140	175
G. Seasoned	80	105	130	165	200
H.	100	125	155	195	230
I. Specialized	115	150	185	225	260

II INITIATIVE

This factor measures the extent to which the operational environment of the job requires and permits independent action and/or problem resolution, as governed by the proximity of any or all of direct personal supervision, control by the work flow sequence, or the existence of established methods, procedures, rules and/or practices.

<u>DEGREE</u>	<u>DESCRIPTION</u>	<u>POINTS</u>
1	<u>Detailed:</u> Performs assigned tasks in accordance with specific procedures or detailed instructions; how the work is done, and progress made are frequently checked by supervisor; works on short assignments referring questionable items to supervisor.	10
2	<u>Controlled:</u> Proceeds alone on routine tasks following standard practice or established procedure. Periodic check over specific details of work. Refers all significant deviations to supervisor.	20
3	<u>Generally Regulated:</u> Works with considerable functional independence and completes most assignments without reference to supervisor. The details of performing a given task are usually left to the employee as long as he/she operates within established methods. Refers only unusual problems to supervisor.	35
4	<u>Defined Objectives:</u> Works from general policies and objectives. A definite objective is set by the supervisor and the individual is left to go ahead, in conformity with policies and standards widely accepted either within the University or in that occupation. It is expected there will be need for discussion as to the general phases of the work, but not the specific details. Handles situations remote from supervisor requiring immediate decisions where general rule and regulations apply.	55
5	<u>General Objectives:</u> After initial input from supervisor, works on general assignments by planning all associated activities (such as how to approach the problem, recommended course of action, etc.). Takes action without reference to supervisor, except when problems involve a significant departure from existing policy or accepted practice.	75
6	<u>Broad Objectives:</u> Independent work on broad general assignments, with responsibility for planning of all associated activities. Actions taken are limited only by accepted policies and practices or by the need for formal managerial approval prior to implementation.	100

III COMPLEXITY/JUDGEMENT

This factor measures the variety and difficulty of the duties performed in terms of both the number and diversity of the tasks, responsibilities, methods, procedures and/or techniques used and the nature of the obstacles encountered, and also assesses the extent to which acquired knowledge is used to resolve the likely problems encountered.

<u>DEGREE</u>	<u>DESCRIPTION</u>	<u>POINTS</u>
1	<u>Routine:</u> Work is routine, uncomplicated. Employee normally has little choice of action as detailed instructions cover most situations.	10
2	<u>Semi-Routine:</u> Work conforms closely to established procedures and/or routine. Makes minor choices affecting the sequence of work rather than the accuracy or quality.	15
3	<u>Standardized:</u> Work mostly standardized but involves some variety. Requires choice of action within limits well defined by standard practice or instructions. Decisions affect sequence of work, and to a limited degree, the quality accuracy or utility of results.	25
4	<u>Varied:</u> Work involves variety of activities. Requires judgement in dealing with deviations from accepted standards, regulations, precedents or techniques. Works toward well defined, specific objectives, occasionally adapting methods as required to meet variations in the controlling conditions.	35
5	<u>Diverse:</u> Work of considerable diversity requiring judgement in meeting new or unusual situations and modifying procedures. Work governed only generally by established methods, procedures and precedents.	55
6	<u>Adaptive:</u> Work governed by general instructions, objectives and policies. May occasionally involve changing conditions and problems. Requires judgement to apply factual background and fundamental principles in developing approaches for the solution of problems.	75

7

Creative: Work requires the analysis of broad administrative policies (departmental and University) usually involving frequently changing conditions and problems, the planning of various interrelated activities and/or, on occasion, the coordination of effort within substantial organizational units, etc. Employee works out programs and approaches to major problems and generally performs activities where established policies and principles are inadequate to determine procedure.

100

IV CONTACTS

This factor measures the relative importance, difficulty and sensitivity of personal contacts required by the job, as reflected by who is contacted, the purpose, frequency etc.

<u>DEGREE</u>	<u>DESCRIPTION</u>	<u>POINTS</u>
1	<u>Incidental:</u> Contacts are incidental to the position, usually involving immediate associates in the department (may involve senior personnel/faculty in some situations). Ordinary courtesy to avoid friction.	10
2	<u>Routine:</u> Routine contacts beyond immediate associates (eg. students, the public etc.) usually just to provide or obtain factual information with a specific objective. Not responsible for cultivating cooperation or approval. Ordinary courtesy, awareness of representing the University (eg. answering the telephone, receptionist duties, dispensing stores/equipment, etc.).	20
3	<u>Interpretive:</u> Regular contacts with the public, students, senior personnel or faculty in other units, etc. in order to exchange information and/or provide advice frequently aimed at securing cooperation in or approval of an occupational matter, and/or compliance with established University policy or procedures, legislation, etc. Requires courtesy and some tact, although ultimate responsibility for maintaining harmonious relations and for taking alternative action usually reverts to the supervisor.	45
4	<u>Innovative:</u> Frequent contact with senior personnel in other units, the public, outside organizations where ongoing relationships are important to University operations (eg. government agencies, consultants, etc.), in order to consult with, report on, recommend to and/or coordinated activities between the parties is an important consideration. Often requires the cultivation of unusual cooperation from the other party. Considerable tact is often required, and the employee is generally responsible for the end result and for the maintenance of good relations.	70

DEGREE

DESCRIPTION

POINTS

5

Sensitive: Contacts involve sensitive personal or policy matters pertaining to University employees, faculty or students, where discretion and diplomacy are critical to avoid serious breaches of confidentiality or good human relations, where the required cooperation is not readily forthcoming and persuasiveness and negotiation skills are needed, or where the end result wanted is not covered by legislation, written policy, etc. Internal contacts often involve Deans, Chairmen, Directors, etc. and poor handling may lead to serious disruption of University programs, administration, employee relations, etc.

100

V ERRORS

This factor measures the extent or degree of responsibility for losses or damage that might reasonable occur as a result of an error, rather than through carelessness or a betrayal of trust.

NOTE TO EVALUATORS

Select the Degree which best illustrates the impact of errors which are probable despite due care, not ones which are only remotely possible.

<u>DEGREE</u>	<u>DESCRIPTION</u>	<u>POINTS</u>
1	<p><u>Minimal:</u> Procedural errors, readily detected in normal course of work by standard checks (eg. manual cross-checks, computer edits, normal proof-reading, etc.)</p> <p>Productivity --- mainly own time to correct Goodwill --- minimal (peer relationships) Safety of others --- nil Financial --- loss of up to \$100</p>	10
2	<p><u>Minor:</u> Procedural errors, probably detected within department or section, but may require effort by others to trace and correct.</p> <p>Productivity - time of others, workflow delays Goodwill - some embarrassment, apology in order Safety of others - minor accidents (no-time loss) Financial - generally in \$100 - \$500 range</p>	20
3	<p><u>Awkward:</u> Procedural errors, generally not detected until visible outside unit, causing delays in related or succeeding operations, and/or embarrassment or difficulty to users or erroneous information or product, where expressions of concern to supervisor are likely.</p> <p>Productivity - visible disruption to work of others Goodwill - public embarrassment; verbal apology by supervisor Safety of others - minor time-loss accidents Financial - generally in \$500 - \$1500 range</p>	45

<u>DEGREE</u>	<u>DESCRIPTION</u>	<u>POINTS</u>
4	<p><u>Serious:</u> Errors are probably ones of judgement (rather than mechanical); may reflect incorrect estimates, insufficient research, missed external deadlines, breaches of confidentiality, etc., where verbal complaints to Department Head or senior personnel are likely.</p> <p>Productivity/ - may jeopardize meeting University obligations, cause departmental embarrassment, and warrant written apology from supervisor</p> <p>Goodwill</p> <p>Safety of others - major time-loss accidents (may include some L.T.D.)</p> <p>Financial - up to \$5000 range</p>	70
5	<p><u>Major:</u> Errors in judgement or planning have repercussions at senior University levels, with adverse effect on relations with the student body, employee groups, external organizations, etc., where formal written complaints or critical media coverage is likely.</p> <p>Productivity/ - significant effort by senior University officers to rectify problem, re-establish goodwill, etc.</p> <p>Goodwill</p> <p>Safety of others - permanent L.T.D. or death</p> <p>Financial - generally \$10,000 or more</p>	100

VI SUPERVISION

This factor measures the job's responsibility, both directly and through subordinate supervisors, for the work done by other positions. Reflects both the Character and Scope of the supervision exercised.

NOTE TO EVALUATORS

- A) SCOPE:
1. As reflected by the total number of persons supervised (directly and/or indirectly).
 2. Where pertinent, Casual staff should be assessed on an approximate FTE "best fit" basis.
 3. Determine the appropriate character degree, and then select the relevant scope number bracket in the following grid.

- B) CHARACTER:

DEGREE

1. Incidental: Occasionally shows others (usually peers) how to perform tasks or duties (ie how they do it).
2. Lead: Has ongoing responsibility for guidance of others (ie. How it should be done) and limited responsibility for assigning daily tasks, checking accuracy, etc.
3. Assistant: In a large work group, functions much the same as a lead hand but, in addition, is formally designated or recognized at the "21C", will assume "acting" duties during the supervisor's absence (ie. During the day, vacations, etc.), and will usually be delegated a share of the daily control activities, etc.
4. Staff: Usually within an academic unit, is responsible for monitoring the activities of other employees who daily, and for the majority of their time, report functionally to other persons (eg. Faculty) to receive daily tasks or duties; ensures unit standards of service and reallocates workloads during absences/special projects; may participate in interviewing new staff, make recommendations to budget head regarding discipline, workload changes, etc.
5. Immediate: Is directly responsible to the next highest level for the results of work performed by others, maintains quality and quantity of work, resolves daily workflow difficulties, trains staff on procedural changes, approves minor personnel requests (eg. Medical appointments, 1 or 2 day vacations, etc.), facilitates good working relations, reports to next highest level regarding staff performance or discipline problems.

6. Coordinative: This Degree is an extension to that described under Staff (no. 4), and includes such factors as: added involvement in supervisory activities due to the budget head's style and/or preoccupation with other matters; direct and more formal involvement in assessing performance (alone or in addition to that provided by others), hiring new staff, ~~initiating disciplinary action~~, etc.; supervising greater variety of classification supervised (ie. office support and technical); concurrent direct supervisory responsibility of general departmental staff; working through subordinate supervisors, etc.

7. General: Assists in establishing unit standards of quality and quantity, unit workloads and organization (position duties), unit workflow, procedures, priorities and schedules; conducts all interviews for new staff and recommends successful candidate to a section or division head, budget head, etc.; formally evaluates performance, discusses it with individual, etc.

SUPERVISION POINTS

<i>SCOPE</i>	Any	Small A (1-3)	Medium B (4-7)	Large C (8-15)	Significant D (+16)
<i>CHARACTER</i>					
1. Incidental	5				
2. Lead		10	20	30	40
3. Assistant		15	25	35	45
4. Staff		20	30	40	50
5. Immediate		35	45	55	65
6. Coordinative		40	50	60	70
7. General		55	65	80	100

VII EFFORT/DEMANDS

This factor measures the effort required in performing the work of the position during normal circumstances, and recognizes that the demands may take the form of physical effort, demanding motor skills, concentrate mental/visual attention, monotony or boredom in repetitive work, and/or frequent exposure to stress in jobs with large volumes and critical deadlines.

<u>DEGREE</u>	<u>DESCRIPTION</u>	<u>POINTS</u>
1	<u>Favourable:</u> Involves only very limited and/or occasional need for physical exertion, reasonable level of motor coordination (given formal training in keyboarding, etc.), reasonable comfortable mental and visual concentration or application due to a desirable variety in tasks throughout most days, and reasonable efficiency where “must” deadlines and/or high volume workload surges are occasional or infrequent. The position requires normal sensory attention and/or is subject to normal physical fatigue and/or mental stress.	10
2	<u>Moderate:</u> Nature of job requires some physical effort (eg. Lifting, frequent walking, or standing for long periods, etc), considerable manual dexterity, and/or mental/visual concentration over periods of a couple of hours at a time, either an unusual daily/weekly variety (ie. “Keeping several balls in the air” at the same time) or less than usual variety (ie some monotony), or exposure to limited but regular periods of high volumes and/or critical deadlines. The position usually requires moderate sensory attention and/or on occasion may be subject to more than normal physical fatigue and/or mental stress.	30
3	<u>Considerable:</u> Involves frequent need for extended periods of heavy physical exertion, a high degree of competence in manual dexterity or visual concentration over long periods each day where a close attention to detail is mandatory, and/or ability to work under continuous pressure from high work volumes and/or critical deadlines (eg. Payroll, student registration, data entry production jobs, etc.) The position may frequently require considerable sensory attention and/or may be subject to moderate physical fatigue and/or mental stress.	60

4

Onerous: Requires a sophisticated manual or motor dexterity over long periods in order either to produce a marketable product (eg. Precision mechanical electrical layouts, designs, etc.) or where the safety of others is affected (eg. Certain techniques involving the frequent handling of biological or radiation hazards), or constant exposure to critical deadlines, detailed work and/or volume pressures, but where interruptions are likely. The position may frequently require extreme sensory attention and/or may be subject to considerable physical fatigue and/or mental stress.

100

VII PHYSICAL ENVIRONMENT

This factor measures the degree to which the job is performed in a disagreeable or dangerous environment.

<u>DEGREE</u>	<u>DESCRIPTION</u>	<u>POINTS</u>
1	<u>Agreeable:</u> Equivalent to normal office conditions. Minimal physical discomfort with only brief and/or minimal exposure to such elements as uncomfortable noise, dirt, temperature, or light levels, and/or ill-health/injury-causing situations.	10
2	<u>Minor Disadvantage:</u> Inside work, with only very limited outside work or scheduled travelling, but with some exposure to noise, dirt, temperature, fumes, etc. Occasional physical discomfort or exposure to situations which could cause ill-health or minor accidents, with little chance of serious injury.	20
3	<u>Uncomfortable:</u> Typical factory or shop conditions where there is moderate physical discomfort due to exposure to such uncomfortable elements as fumes, temperature, noise, dust, etc., or where outside work or travel involves a significant portion of time (up to 50%) . Reasonable chance of a time-loss work related injury or sickness.	45
4	<u>Disagreeable:</u> Considerable physical discomfort due to continual exposure to unpleasant environmental conditions (eg. Fumes, dirt, noise) or continuous outside work, or travelling on or off-campus for over 50% of the time. Reasonable to good chance of time-loss work related injury or sickness.	70
5	<u>Severe:</u> Extreme physical discomfort due to prolonged exposure to an environment in which there is a reasonable possibility of contracting a major occupational disease (eg. Harmful chemicals, radiation, etc.), or extreme occurrences of other dangerous conditions.	100

OFFICE SUPPORT POINT BANDS

Point Bands	Clerk	Sec	L.A.	Admin.	W.P.	Lib.	KPO	PP	Driver	Draftperson	Hall	Arena	STKP	LRK	Swit Bd	CS	Book
	Level	Level	Level	Support	Level	Guide	Level	Level	Level	Level	Clerk	Foreperson	Level	Att.	Attend	I	Sales
50-100	I	I	I	-	-	-	-	-	-	-	-	-	I	-	-	-	I
101-150	II	II	II	-	I	-	I	-	I	-	I	-	II	-	*	-	II
151-225	III	III	III	-	II	-	II	II	II	I	-	-	III	*	-	-	III
226-300	IV	IV	IV	S.G.9	-	SUPV	III	III	III	-	HEAD	-	IV	-	-	-	IV
301-375			V	S.G.10		-	IV	IV		II	-	-					
376-450				S.G.11				V		III		*				*	
451-525				S.G.12						IV							