



THE CITY OF
CALGARY
HUMAN RESOURCES



**CUPE Local 37
Job Evaluation Plan &
Interpretation Guide
Updated: September 28, 2011**

Factor: Education

This factor measures the minimum level of education required to perform the major duties and responsibilities of the job.

Note: Management is responsible for establishing consistent minimum levels of education for jobs at The City of Calgary.

Guidelines for response:

- Minimum education is the education that an employee must possess before being hired into the job. It does not measure an individual employee's level of education but rather measures the education requirements of the job
- Education is most commonly acquired by time spent in schools such as high school, technical schools and college
- Instruction, training and accredited courses are also considered under this factor
- For jobs requiring certification (i.e. journeyman trades) only classroom time is considered under the education factor

- Although employee comments are reviewed, the evaluation of the education factor is based on the supervisor comments
- For situations involving equivalent qualifications, the lowest level of education and the coinciding years of experience are evaluated
- The requirement for a provincial driver's licence is not considered in the evaluation of the education or experience factors
- Training provided in-house at The City of Calgary is not considered in the evaluation of the education factor (i.e. fleet training, TDG training, WHMIS, First Aid, etc.)

Levels:

1. Less than high school diploma.

- Includes less than high school diploma + additional coursework

2. High school diploma or equivalent General Equivalency Diploma (GED).

3. High school diploma or GED plus up to six months of additional instruction, training or accredited courses.

- This level includes the requirement for a 3 year Journeyman ticket (24 weeks/6 months classroom time) which does not require a High School Diploma or GED as a prerequisite
- This level includes the requirement for a Building Operator A or B, 2 or 3 or Power Engineering 4th or 5th class which does not require a High School Diploma or GED as a prerequisite

4. One year diploma or certificate or the equivalent of one year of full-time study.

- This level includes the requirement for a 4-year Journeyman ticket (32 weeks/8 months classroom time = 1 year of full-time study) which does not require a High School Diploma or GED as a prerequisite

5. Two year diploma or the equivalent of two years of full-time study.

Factor: Experience

This factor measures the minimum level of job-related experience required to perform the major duties and responsibilities of the job.

Note: Management is responsible for establishing consistent minimum levels of experience for jobs at The City of Calgary.

Guidelines for response:

- Minimum experience is the job-related experience that an employee must possess before being hired into the job. It does not measure an individual employee's work experience but rather measures the minimum experience requirements of the job
- The experience required for the completion of a certificate (i.e. field, operating or shop time) is considered under this factor

- Although employee comments are reviewed, the evaluation of the experience factor is based on the supervisor comments
- Job-related experience considers the experience required to obtain certification + experience required after certification (i.e. experience required to obtain a Journeyman ticket + experience required as a Journeyman)
- The requirement for a provincial driver's licence is not considered in the evaluation of the education or experience factors
- One season = 6 months
- For positions that are progressive, experience is cumulative (i.e. one year experience before hire to become a Repairman Bridge Trainee plus two years as a Repairman Bridge Trainee to become a Repairman Bridges for a total of three years experience before hire into the Repairman Bridges).

Levels:

- 1. Six months or less.
- 2. Over six months up to and including 12 months.
- 3. Over 12 months up to and including 24 months.

- Includes "at least 2 years experience"

- 4. Over 24 months up to and including 48 months.

- Includes "Over 2 years of experience"

- 5. Over 48 months.

Factor: Problem Solving

This factor measures the **typical** kinds of problems, situations and issues that arise in the job **and** the **typical** methods used to respond to or solve them.

Guidelines for response:

Consider the typical range of problems, situations and issues that are responded to by the employee.

- Consider the complexity of the problems, the level of analysis required, and the solutions available

Levels:

1. The problems tend to be routine, similar and straightforward; detailed solutions and appropriate responses are clear, straightforward and readily available to address these problems; there are little or no choices of action.

- Problems are routine, similar and straightforward; solutions or responses are simple and easily implemented
- A “doer”

2. The problems tend to be repetitive and recurring and follow a regular pattern (i.e. they are easily identified). A limited number of options/solutions are available and established. The employee assesses alternatives and chooses the best response.

- Problems are evident and regularly encountered. The employee chooses from a number of possible options/solutions. For example, the employee performing the job is required to set up and/or operate a piece of equipment with peripheral variables (e.g. power lines, trees, etc) and must assess the alternatives for set up and/or operation and choose the best option

3. The problems tend to be different and require analyzing a number of variables. Responses involve applying a variety of known solutions or standard and accepted practices.

- There are a variety of problems
- A higher level of analysis is required by the employee performing the job in order to find/identify the cause of the problem. Troubleshooting (i.e. a process of elimination) is required to identify the cause of the problem
- Once the cause of the problem has been identified, known solutions or standard and accepted practices are applied

4. The problems tend to be less predictable, more complex and require the analysis of a wide variety of variables and diverse information. In-depth analysis, interpretation and diagnosis of vague or misleading information and varied alternatives are applied to develop solutions.

- Problems are complex
- Analysis of a number of variables may include researching and reviewing a variety of sources to diagnose and solve the problem
- Solutions are not apparent; adaptation of known solutions may be required

Factor: Freedom to Act (formerly Independence)

This factor measures the job's typical independence of action or latitude to carry out the job duties and responsibilities.

Guidelines for response:

The job's independence is limited by the amount of supervision, direction and/or control received either from a supervisor **OR** from the existence of policies, standard operating procedures and/or practices. Consider the extent to which work is reviewed by other employees and to which supervisors (e.g. foreman or lead hand) or other employees must be consulted before taking action.

- This factor measures the latitude within the job to decide what, how and/or when work is done

Levels:

1. Works within narrowly defined procedures; complete and detailed instructions are provided; work is routinely checked and/or difficulties are referred to the supervisor.

- Detailed instructions and/or directions are provided OR the work is routine
- There is limited latitude to decide or plan what, how or when work is done (i.e. work is scheduled)

2. Works within defined procedures and/or practices; direction is provided by a supervisor.

- There is some latitude to prioritize the day's work
- While adhering to defined procedures and/or practices, there is some latitude to choose how to complete a task

3. Work is done within general practices and/or policies; general direction is provided by a supervisor and choices of alternative actions are available for performing job duties.

- There is latitude to decide how and/or when a group of tasks that make up a major part of the job's duties is done. For example, the employee performing the job determines the order of activities within the season and has the latitude to change the schedule depending on other priorities that may arise
- There is latitude to assign work to others within the work unit, or to contractors from a pre-approved list based on defined requirements for contractor work
- There is latitude to prioritize work over short periods of time (i.e. ranging from several days to several weeks)

4. Works within policies and broad direction is provided by a supervisor.

- There is latitude to decide what, how and/or when the major duties of the job are done
- The employee performing the job has the latitude to determine if, when and/or how additional materials or external resources are required to complete work and can purchase additional materials or assign work to others, including contractors
- The employee performing the job works independently; only exceptional or very unusual situations are referred to the supervisor

Factor: Impact of Decisions

This factor measures the direct impact of typical actions, recommendations or decisions that are required by the job.

Guidelines for response:

This factor measures those actions, recommendations or decisions that employees make on their own. It also measures effective recommendations that are normally expected from the job when such recommendations are typically implemented.

This factor measures how quickly the impact can be contained (e.g. impact is noticed immediately or noticed at some time in the future).

Impact can be either positive or negative. It can be most clearly illustrated by considering the impact of a typical action, decision or recommendation that turns out to be a less than desirable choice.

This factor does not consider the impact of making mistakes resulting from ignoring policies, standard operating procedures or practices or from poor performance. This factor also does not consider the impact of the worst possible mistake that could be made.

- This factor measures the impact of an actual action, an effective recommendation, or a decision. It does not measure the impact of the whole job's existence but rather, the outcome of actual actions, recommendations or decisions required by the employee performing the job
- The employee performing the job must have the authority and responsibility for the action, recommendation or decision. For example, it is the employee's responsibility to perform an action or make a recommendation or decision. It does not measure the impact of actions, recommendations or decisions made by others
- This factor measures the direct impact of decisions, not the speed in which decisions are required to be made
- This factor measures the impact of a choice, given all the information available at the time, that results in a less than desirable action, recommendation or decision. This factor does not measure the impact of an action, recommendation or decision that ignores policy, procedure or practice, or the impact arising from poor performance

Levels:

1. Typical impact is immediate and limited to the job and job site

- The impact of actions, recommendations and/or decisions is limited to a single task
- Impact is contained to the site where the task is performed; the impact related to the task may be noticed/experienced by others located at that site

2. Typical impact is extended to the work area and surrounding locations

- The impact of actions, recommendations and/or decisions is noticed/experienced by other crews, work areas or sections and/or citizens. For example, the actions, recommendations and/or decisions of a trainer impacts trainees' abilities to do their work; the actions, recommendations and/or decisions of a job responsible for delivery of supplies impacts the ability of other crews to do their work

3. Typical impact is extended to the broader work area

- The impact of actions, recommendations and/or decisions is noticed/experienced by a larger demographic. For example, the actions, recommendations and/or decisions of an employee performing a job responsible for scheduling maintenance results in the closure of a recreation facility and impacts patrons, other leisure centre employees and tenants
- Impact is noticed/experienced by others in a broader work area (i.e. within the division)

4. Typical impact is extended beyond the broader work area.

- The impact of actions, recommendations and/or decisions is noticed/experienced by a large citizen base

Factor: Interaction

This factor measures the typical responsibility of the job to interact with others, including employees, customers, vendors/suppliers and the general public, in order to perform the major duties and responsibilities of the job.

Guidelines for response:

Although interaction tends to be of a personal nature, requiring the establishment of effective working relationships, this factor does not measure the interaction skills of individual employees but rather measures the requirements of the job.

Interaction may include talking face-to-face or on the telephone with others or making presentations.

Consider the **purpose** or nature of the interaction required by the job. Interactions with the public can exist at all levels described below.

Levels:

1. The job requires working respectfully with crew members or others.

- The employee performing the job receives directives, shares information and works with crew members or others to accomplish routine activities

2. The job requires exchanging information **OR** discussing job-related duties.

- The employee performing the job exchanges/discusses information about where/what/how to complete job-related tasks or duties
- The employee performing the job communicates rules, processes and procedures
- The employee performing the job is responsible for working out details between two or more parties in order that work can be completed
- The employee performing the job is responsible for making arrangements related to the work

3. The job requires discussing problems and potential solutions, responding to requests and making recommendations or decisions; **AND/OR** providing formal technical instruction/training to others.

- The employee performing the job discusses problems and potential solutions, responds to requests and makes recommendations or decisions that are specialized in nature. The parties involved in the discussions may have the same or different levels of understanding about the problems, potential solutions, requests, recommendations or decisions
- The employee performing the job is responsible to coordinate activities and/or manpower
- This level includes journeymen who have a formal responsibility to train apprentices

4. The job requires providing formal direction to employees, including monitoring performance and motivating others to take action.

- The employee performing the job provides formal direction to others including assigning and checking work (delegating), monitoring performance (not necessarily evaluating), providing feedback and giving corrective directions to address performance and behaviour onsite
- The requirement to provide formal direction must be an ongoing requirement of the job

Factor: Working Conditions

This factor measures the actual frequency and severity of exposure to disagreeable conditions or hazards in the work environment, after all required safety precautions have been taken.

Guidelines for response:

Consider only those conditions or hazards which are inherent in the nature of the work (i.e. those that cannot be eliminated or easily changed). Take into account whether the activity can be avoided or rescheduled. The frequency of working conditions considers that scheduled breaks are taken during the day.

Examples of minor conditions/hazards include, but are not limited to, chemicals, dirt, dust, fumes, heat or cold, heights, inclement weather, interruptions, minor cuts, burns, bruises or infectious diseases, noise, pedestrian/vehicular traffic, rudeness/profanity, slippery surfaces (e.g. wet and gravel), varied lighting/visibility and vibration, working outside, driving in traffic.

Examples of major conditions/hazards include, but are not limited to, bodily fluids, confined (OHS definition) or isolated spaces, dangerous equipment or hazardous materials, emotionally troubling situations, needles/sharps, obnoxious odours, severe cuts, burns, bruises or serious infectious diseases, toxic chemicals and verbal or physical abuse.

	Percentage of Time Actually Exposed
Minor Conditions/Hazards	Level 1 - Occasional: 0-20% Level 2 – Regular: 20-40% Level 3 – Frequent: 40% or more
Major Conditions/Hazards	Level 2 - Occasional: 0-20% Level 3 – Regular: 20-40% Level 4 – Frequent: 40% or more

Level 1

- Typically inside work
- Occasional exposure to minor conditions or hazards

Level 2

- Regularly drives a vehicle and/or operates equipment
- Work involves inside and/or outside activities

Level 3

- Typically outside work
- Frequent exposure to noise and dust
- Frequent work on roadways (e.g. the employee performing the job is physically located on the roadway)
- Regularly works with hazardous equipment/machinery (e.g. moving parts, exposed fan belts)

Level 4

- Frequent exposure to major hazards

Factor: Physical Demands/Physical Exertion

This factor measures the typical period of time when exertion is required.

Guidelines for response:

Assume the job is being performed by someone of adequate physical capacity for the type of work involved. Do not consider personal abilities, individual levels of fitness or preference for a type of physical effort that are not required by the job.

Consider whether there is choice of action available to seek relief from performing the physical activity or to perform less demanding physical activities. The frequency of time considers that scheduled breaks are taken during the day.

Examples of physical activities include, but are not limited to, climbing, crouching, driving, kneeling, laying down, lifting, standing, stooping, pushing and/or pulling objects (may be awkward), walking and activities requiring the co-ordination of course movements (e.g. hammering, minor repairs to equipment and repetitive motions) or fine motor skills (e.g. precise keyboarding, completing precise repairs or adjustments to instruments or equipment).

- Consider the intensity, severity and duration of physical activities and the overall requirement for exertion
- To evaluate the physical demands of driving consider the duration of driving, the type of vehicle driven, terrain, whether there is a load on a vehicle and whether something is being hauled. These requirements should also be considered for sensory demands
- Definitions include:
 - Tools: hand tools, power tools (e.g. drills, chain saws, power trimmer, etc)
 - Equipment: self propelled or ride upon (e.g. gravely, mowers, ditch witch, etc)
 - Truck (e.g. ½ ton, 1 ton, 5 ton)
 - Equipment tied to truck (e.g. Hydrovac, forks on front end, paint truck, plow and sander, etc)

Levels:

1. Physical exertion is required occasionally (up to 20 percent of the job's time).

- Light physical exertion is required for short periods of time (i.e. walking, light cleaning of shop, light maintenance, lifting and carrying once in awhile)
- This level includes limited mobility (i.e. sitting and/or standing for periods of time)

2. Physical exertion is required regularly (i.e. 20 percent to 40 percent of the job's time). There are choices of action available to seek relief from performing the physical activities.

- Light physical exertion is required almost continuously
- This level includes repetitive tasks that require light physical exertion
- This level includes the requirement to complete minor repairs and/or maintenance on small components
- This level includes the requirement to load, unload and/or carry tools, equipment and/or supplies that requires light physical exertion

- 3. Physical exertion is required frequently (i.e. 40 percent to 60 percent of the job's time). Significant physical effort is required and there are limited choices of action to seek relief from performing the physical activities.

- There is an ongoing requirement for significant physical effort
- This level includes the use of large tools to complete repairs on larger components (e.g. disassemble, repair and reassemble larger items)
- This level includes the requirement to frequently load, unload, lift and/or carry, dig, rake, push and pull

- 4. Physical exertion is required for extended periods (i.e. 60 percent and over of the job's of the time and over) and results in exhaustion. Substantial physical effort is required and there are little or no choices of action to seek relief from performing the physical activities.

- Intense physical exertion is required for extended periods

Factor: Sensory Demands

This factor measures the typical period of time when mental, visual and/or listening concentration is required.

Guidelines for response:

There is a difference between attentiveness required in all jobs and concentration required in some jobs. Consider whether there is a choice of action available to seek relief from performing the activity or to perform less demanding activities. The frequency of time considers that scheduled breaks are taken during the day.

Examples of sensory activities requiring concentration include, but are not limited to, completing timesheets, interpreting information, inputting data accurately, listening to understand, observing, operating equipment (including driving), reading documents such as construction drawings, budget printouts and utility maps, reconciling procurement card statements, scheduling manpower, timekeeping and working in pedestrian and vehicular traffic.

- Attentiveness is defined as paying attention by listening or watching carefully, being alert, being prepared to respond or react
- Concentration is defined as directing all thought or effort toward one particular task, idea, or subject
- Consider the complexity of equipment being operated and the environment in which work is performed
- To evaluate the sensory demands of driving consider the duration of driving, the type of vehicle driven, terrain, whether there is a load on a vehicle and whether something is being hauled. These requirements should also be considered for physical demands
- Definitions include:
 - Tools: hand tools, power tools (e.g. drills, chain saws, power trimmer, etc)
 - Equipment: self propelled or ride upon (e.g. gravely, mowers, ditch witch, etc)
 - Truck (e.g. ½ ton, 1 ton, 5 ton)
 - Equipment tied to truck (e.g. Hydrovac, forks on front end, paint truck, plow and sander, etc)

Levels:

1. Concentration is required for occasional periods (i.e. up to 20 percent of the job's time).

- Concentration is required to complete single tasks
- This level includes the requirement to drive to a site

2. Concentration is required for regular periods (i.e. 20 percent to 40 percent of the job's time). There are choices of action available to seek relief from performing the sensory activities.

- Concentration is required to focus on details (e.g. complete paperwork, read blueprints)
- This level includes the requirement to drive from site to site or continuously
- This level includes research (e.g. related to parts or supplies, V&E documents)
- This level includes the use of hand tools or small equipment
- This level includes the requirement to complete minor repairs
- This level includes the requirement to observe and direct others

3. Concentration is required for frequent periods (i.e. 40 percent to 60 percent of the job's time). Significant sensory effort is required and there are limited choices of action to seek relief from performing the sensory activities.

- This level includes the requirement to drive a vehicle and operate other equipment (e.g. boom crane, forks on front of a truck, bucket truck, auger)
- This level includes the requirement to prioritize and assign work, monitor and assess the performance of others
- This level includes the requirement to complete complex repairs

4. Concentration is required for extended periods (i.e. 60 percent and over of the job's of the time and over) and results in exhaustion. Substantial sensory effort is required and there are little or no choices of action to seek relief from performing the sensory activities.

- Concentration is required to work in a complex environment and utilize multiple senses on a continuous basis