

**OFFICE AND PROFESSIONAL EMPLOYEES INTERNATIONAL UNION
(O.P.E.I.U.) LOCAL 404, CHALK RIVER
PAY EQUITY REVIEW SUBMISSION
TO THE
GOVERNMENT OF CANADA
PAY EQUITY TASK FORCE**

2002 September

**Submission by: Mrs. Wendy Holland, President
O.P.E.I.U., Local 404
91 Pinewood Drive
Deep River, ON K0J 1P0
(613)584-4528
Fax: (613)584-1220
hollandw@aecl.ca**

TABLE OF CONTENTS

1.0	BACKGROUND	1
2.0	PROCESS	2
2.1	Employee Questionnaires	2
2.2	Screening.....	3
2.3	Evaluation Teams.....	3
2.4	Determination of Scores	4
2.5	Weighting.....	5
2.6	Generic Level Descriptors	5
2.7	Management Review	5
3.0	PROCESS ISSUES	6
4.0	IMPLEMENTATION AND ISSUES	7
5.0	RECOMMENDATIONS.....	9
6.0	AECL-CHALK RIVER NON-UNIONIZED EMPLOYEES	9
6.1	Chronology of Events	10
6.2	Recommendations.....	11
	APPENDIX A: PAY EQUITY SETTLEMENT BETWEEN O.P.E.I.U. LOCAL 404 AND AECL, 1997 OCTOBER 7	A1
	APPENDIX B: JOINT PAY EQUITY STUDY AGREEMENT BETWEEN O.P.E.I.U. LOCAL 404 AND AECL, 1999 DECEMBER.....	B1
	APPENDIX C: JOINT CLASSIFICATION STUDY TERMS OF REFERENCE.....	C1
	APPENDIX D: JOINT CLASSIFICATION STUDY MILESTONES SCHEDULE	D1
	APPENDIX E: JOINT CLASSIFICATION STUDY EMPLOYEE QUESTIONNAIRE.....	D1
	APPENDIX F: JOINT CLASSIFICATION STUDY JOB EVALUATION TOOL.....	F1
	APPENDIX G: JOINT CLASSIFICATION STUDY WEIGHTING SCENARIO	G1
	APPENDIX H: JOINT CLASSIFICATION STUDY IMPLEMENTATION LETTER	H1
	APPENDIX I: O.P.E.I.U. LOCAL 404 COMPLAINT WITH THE CHRC, 2002 MAY 13	I1

1.0 BACKGROUND

The Office and Professional Employees International Union (O.P.E.I.U.), Local 404 (hereto referred to as "the Union"), is a predominately female union, comprised of approximately 200 employees in 1997 of which less than 10% were male. Through layoffs due to reorganizing/downsizing in Atomic Energy of Canada Limited (AECL) (hereto referred to as "the Company"), the bargaining membership has been reduced to approximately 144 employees, of which 23 are male.

On 1994 April 04, the Union filed a complaint with the Canadian Human Rights Commission (hereto referred to as "the CHRC") (File No. X00467) regarding the non-payment of sufficient funds by the Company to close the wage gap for the years 1993 to 1996.

On 1997 October 07, the Union and the Company signed an agreement (Appendix A) of settlement which provided a pay equity adjustment for the years in dispute, and a provision for a joint pay equity study to commence 1999 November to ensure that the employees in the predominately female and male occupational groups received equal pay for work of equal value, in accordance with the Canadian Human Rights Act and the Equal Wages Guideline, 1986. The study would affect approximately 500 current and former employees of the Company, of whom, at that time, approximately 200 employees were members of the Union occupying predominately female jobs.

To safeguard the integrity of the Joint Pay Equity Study, the CHRC agreed to monitor in cases where the pay equity specialist hired by the Company and all parties concerned could not resolve an issue. In the intervening years, the staff of the CHRC changed, leaving no one conversant with the terms of the 1997 settlement.

The pay equity study was completed, and an agreement (Appendix B) was signed between the Union and the Company in 1999 December. As part of this agreement, it was agreed that a joint, company-wide Job Classification Study would take place. The study would include the unionized CM6-CM11 and the non-unionized M6-M11 pay ranges, or classification levels in the Company across the various sites, including those at Chalk River, Sheridan Park, Whiteshell (Manitoba), Montreal and Ottawa. The Study was broad enough in scope to reclassify all unionized and non-unionized clerical and administrative jobs, including the male-dominated trade and technical jobs at the Sheridan Park site within the M6-M11 pay ranges. As recommended by the Company-hired consultant, it was agreed the methodologies used for the 1999 Pay Equity Study would be adopted for this purpose.

As a condition of the agreement, a Joint Classification Study Steering Committee (hereto referred to as the "Steering Committee") was formed of unionized, non-unionized and management employees from Chalk River and Sheridan Park, as well as a Company-hired consultant. Because the Whiteshell site in Manitoba was in process of closing, and the Montreal and Ottawa offices were small in size, no representatives from these areas were included on the committee. The initial mandate of the Steering Committee was to create, and adhere to an agreed-to Terms of Reference (Appendix C) for the study. The Terms of Reference encompassed:

- The scope of the study;
- The composition of the Steering Committee;

- A schedule of milestones;
- Communications;
- Completion date, and the payment of any resulting adjustments.

The Milestones Schedule (Appendix D), which provided a timeframe for each of the activities in the study, proposed a completion date no later than 2001 March 31, as mandated by the 1999 December pay equity agreement. Because of the evolution of jobs in the clerical and administrative fields due to technological change, the schedule of milestones would have to be strictly adhered to. Meeting this goal would require the cooperation of employees and management, as well as the availability of company resources.

2.0 PROCESS

The Classification/Job Evaluation study involved the assessment of jobs at the Company to ensure that jobs of equal value would be paid at the same grade level regardless of location. A comparison of different work can be done if there is 1) a set criteria which can measure all kinds of work, and 2) sufficient information about the skill, effort, responsibility and working conditions present in all jobs. The Job Evaluation Standard communicates what is valued in work at the Company. Job information described in each Questionnaire would communicate what is required in a particular job. However, the job evaluation tool is merely a way of analyzing and sorting information. The information needs to be complete and understandable to maximize effectiveness of the results. To that end, the Steering Committee was to effectively communicate the specifics of the information requirements and timelines to all involved staff members and management. This communication would include agreed-to site-wide information bulletins, site-specific orientation sessions, site-specific employee and management training sessions, a complete and accurate website available to all staff, and site-wide update bulletins at specific intervals.

It was the expert opinion of the Pay Equity Consultant on the Steering Committee that the job evaluation tool, the job information collection tool (questionnaires) and the job evaluation rating forms from the previous pay equity study would serve for the classification study as well. Under her guidance, the Steering Committee agreed. The study process began in 2000 January with the first step.

2.1 Employee Questionnaires

The 25-page employee questionnaire (Appendix E) was structured into four themes: (1) job duties, (2) resources required to perform the work, (3) communications, (4) the physical/psychological stresses of the job. The Steering Committee, under the guidance of the consultant, slightly modified the employee questionnaire used during the joint pay equity study to update the format, to make the questions more understandable, and to ensure that all the job information was captured.

Training sessions were given to employees at Chalk River and Sheridan Park by the consultant on how to complete the form. Experts (“coaches”) were made available to answer any questions. The questionnaires ask for real and absolute job information, not “valued” or “projected” information.

Following their attendance at the training sessions, employees were asked to complete the job questionnaires to the best of their ability. Individual employee managers were then asked to review the questionnaire with their staff member to determine if any areas of the questionnaires were inaccurate or unclear. Managers were not to pressure employees to remove or revise details of the questionnaire for reasons other than for complete accuracy in the job details. With their manager's endorsement, employees were to then submit their completed questionnaire to the Company Human Resources office contact.

The completed questionnaires were to be sent to the Company Human Resources Branch, where they were given a number and logged into a database to await the next step of the process.

2.2 Screening

The screening part of the evaluation process is an essential tool in determining that the information received on the questionnaires is accurate, and clear.

A screening team of approximately twenty volunteers was formed to review each submitted questionnaire. Screeners were to check the questionnaires for completeness, understanding and clarity. They were to make sure all the questions had been answered, any acronyms were defined, and all sections been completed. Screeners were asked to ignore spelling and grammar unless it made the meaning unclear, and any areas of concern were to be flagged. To aid the screener in this task, a checklist was developed.

On completion, a screener returned the questionnaire with their comments to Human Resources, who in turn returned it to the employee for a review of the comments provided. In consultation with their manager or supervisor, an employee would make the appropriate adjustments, and return it promptly to Human Resources for the next step in the process.

2.3 Evaluation Teams

Following the screening process, the questionnaires were then to be evaluated. Management and employee volunteers were requested to make up 6 teams, 3 at Chalk River and 3 at the Sheridan Park site. The team members were trained by the consultant, and instructed to evaluate each questionnaire objectively without bias or stereotyping. To aid in this, employee names and job titles (the first page) were removed from the questionnaires.

The team members were advised the evaluation of the questionnaires would be based on 12 factors contained within 4 groups. These factors measured the skill, effort, working conditions, and responsibility required to perform a job. The factors were:

- Skill
 1. job knowledge
 2. communication skill
 3. physical skill

- Effort
 4. versatility/flexibility/multitasking
 5. work challenges
 6. physiological (physical and concentration) effort

- Responsibility
 7. deliverables
 8. working with and through others
 9. resources
 10. fostering relationships
 11. coordination
- Working Conditions
 12. physical and psychological

Each team was to review each questionnaire using 2 out of the 12 factors aided by a job evaluation tool, and assigning a rating for each factor. The job evaluation tool used by the teams included factor and scale degree definitions and instruction notes for users that were customized for the Company and had already been used successfully in the pay equity study (Appendix F).

Each team spent time with the consultant to understand how to evaluate the factor assigned, how they could determine its level of importance to the employee's job, and to provide checks and balances that would help to minimize any problems caused by imperfections in the job evaluation tool.

Then, after each member of the team reviewed a questionnaire and assigned a factor rating for the question they were to assess, as a group the team members were to discuss and analyze their results. They were to come to a consensus on the rating of the factor for each questionnaire. The ratings for each job were listed on a chart, with which the team reviewed for anomalies. This was called "Sore-Thumbing". The entire team process was to be completed minimally in approximately 2 weeks, with the teams meeting as time and schedules allowed.

Once the evaluation was complete and the 12 factors had been assigned a rating, the numbers were added and a total assigned to each job. The questionnaires, the team results and the totals were then returned to the Steering Committee for the next step in the process.

2.4 Determination of Scores

Using feed back from the Evaluation teams, the Steering Committee was able to identify clusters of jobs. 'Clusters' were those jobs that were similar to each other and that also have similar evaluation results. These clusters, or 'Job Families' included: Administrative Assistants, Administrative Support/Clerical, Finance, Information Management, Human Resources, Information Technology, Operations, Projects, Supply and Technical.

Using the evaluation results, the Committee then organized the positions into levels of responsibility, of which there appeared to be 5. In theory, each job was given an overall rating and assigned to a classification level based on the range of points for that level. Because the information was inaccurate from the questionnaires, causing discrepancies in the evaluation process, the committee tried to find a job in each cluster where the rating results seemed to be comparable to the rating profiles.

When all the jobs in each cluster had been assessed and levels determined from the results, it was determined that there were 5 classification levels.

Human Resources then introduced a 5 level matrix. Each questionnaire had been assigned a number. According to its rating and job family, each job number was assigned to one of the levels. The Steering Committee members were asked to assess whether or not they felt the jobs fit into the levels assigned according to their knowledge of the jobs themselves. Each member produced another matrix with these results. The matrices were compared, debated and then set aside when consensus could not be reached. Despite this, the Company produced a matrix without the committee's agreement, and this matrix was eventually provided to managers for review in the 6th part of the overall process.

2.5 Weighting

Using a tool provided by the Consultant and agreed-to by the Steering Committee, it was the responsibility of the Steering Committee to weight the 12 factors to allow for differential importance, and assigning a percentage to each factor based on its overall level of importance. This tool was known as a 'scenario' (Appendix G).

Following this, the committee would then determine the total value after weighting of factors and sore-thumbing, using the agreed-to scenario. The analysis of the results includes a review of each job's rating as well as the whole classification structure. The committee, using one of the more important factors (as determined by the percentages), would then analyse the rating results for obvious divisional levels, from lowest to highest, within the factor. These divisional levels would then be applied to each of the other factors, and then overall job levels would be devised. Once the Steering Committee had reached agreement on the weighting results, the committee would move on to the next step in the process.

2.6 Generic Level Descriptors

Generic level descriptors (generic or job profiles) were then to be drafted for jobs in each cluster or family of jobs. Due to the inaccuracy of the information on the questionnaires, Human Resources provided other resources to describe job duties at each level, such as current internal competitions, a resource guide from the Career and Skills Development Committee, and one manager's set of level descriptors.

Human Resources wanted generic level descriptors to be able to classify new and existing jobs and to define a classification and salary grade for each. The generic level descriptors and the Company-produced matrix were then sent to management for the next step in the process.

2.7 Management Review

Human Resources were to send out the preliminary generic job profiles, the matrix, and results of the study to managers to review. This information, considered confidential, was to be reviewed to verify the skills and knowledge of the jobs at each classification level. The manager's comments would then be reviewed by the committee for their merit and incorporated, if appropriate.

Once the generic job profiles were considered complete, they were to be assigned to a classification level for which compensation would be determined. Since the Company and the Union were bound by a collective agreement, they would have to negotiate a salary grade for each classification level. It would be the Company's responsibility to determine these for the excluded positions in the study.

On completion, the results would be implemented site-wide. Employees would receive written notification of their classification and salary level as a result of the study, and an appeal process would be implemented (Appendix H).

If a questionnaire had not been submitted, the respective managers would be consulted and the job benchmarked according to its profile and relative classification level.

For positions upgraded as a result of the study, the current incumbents would receive a retroactive payment. For positions downgraded as a result of the study, the current incumbents would be 'red-circled'.

3.0 PROCESS ISSUES

Training sessions were organized for managers and employees to explain the requirements of the study and how to fill-in the questionnaire. Very few managers attended, nor did Human Resource make it mandatory for their attendance, as was advised by the committee. From the onset, managers felt the study was a waste of time and didn't buy-in to the process. Employees found some of the questions difficult to answer, and as a result the information provided by them was fragmented or missing.

The questionnaire should have been tested on a cross-section of employees before being introduced site-wide. To most employees, the questions were considered to be unclear, complex, so the questionnaires took hours to complete. The union advised HR that it would take each employee at least 7-8 hrs to complete the questionnaire; however, HR informed employees it would take 3-4 hrs.

Because of the lack of cooperation by managers, many of the questionnaires were delayed. To keep the schedule on track, the Steering Committee asked Human Resources to proceed to the next step in the process, using the questionnaires already submitted. Human Resources refused, delaying the process until late in September when the results of the information-gathering were to have been released.

Human Resources determined the screening was not an essential step in the process as they lacked the resources to follow-up on the questionnaires with managers. This was contrary to the assessment of the Steering Committee that this step was vital if the information provided on the questionnaires was to be accurate and useable. Human Resources overruled the committee and the screening step was eliminated from the process.

The evaluation teams were not comprised of volunteers from all job families, especially the technical and financial areas. This resulted in a lack of understanding of many of the positions, and lower scores causing a devaluing of the jobs.

Although the names of the employees were deleted from questionnaires, many of the team members knew the jobs and introduced a bias when rating the factor. For example: Administration Assistants were all given the same score, without reviewing the job duties of each. Human Resources further exacerbated this problem by having groups of employees fill out one questionnaire, and the roles that made each unique were lost.

However, the employees completing the questionnaires were asked to provide a current job title, and a title they thought would reflect their true position. Many of these titles were inaccurate or misleading. These titles were provided to the evaluation team members during the evaluation phase, introducing a further bias and inaccurate determinations.

The team evaluation step of the process was to take 14 days and be completed by 2001 October, but with little management support for the study, and one of the teams disbanding in Sheridan Park, the delay in the process increased.

It was agreed by all the members of the Steering Committee that the information provided on the questionnaires was inaccurate, and that this had caused a problem for the evaluation teams. For example: Technical jobs at Sheridan Park were given low scores because information on the questionnaires was incomplete or unclear. Human Resources unilaterally decided that one job that looked reasonable in each cluster of jobs would be used as a benchmark and all other jobs rated according to it.

For her matrix, the non-bargaining employee representative at Chalk River placed the jobs in her jurisdiction in the levels according to their scores. The bargaining representatives knew that the scores were incorrect because of the inaccuracy of the information and that the jobs were being undervalued, so they placed them in the levels they thought were most appropriate on their matrix. The technical representatives from Sheridan Park placed their jobs in the first two levels because they knew the information provided was inaccurate, had been evaluated incorrectly, and that the jobs were being undervalued. At this point, discussions broke down and Human Resources unilaterally segregated the representatives from Sheridan Park and those at Chalk River, preferring to work with each group separately.

The Union had 6 levels in its collective agreement, and were concerned about combining jobs into 5 levels. They felt this would stifle career and skill development, as it would open a broad gap between the CM10 level and the M12 levels. Collective agreement rights would be violated and jobs devalued if the Company was allowed to combine the CM10 and CM11 levels.

A manager divulged confidential information to 2 employees, one of whom was never downgraded. This issue of due diligence was ignored by Human Resources.

4.0 IMPLEMENTATION AND ISSUES

Throughout the process, the Union continually expressed their concern that Human Resources was making unilateral decisions that would have a negative impact on the study results. In good faith, when it was apparent that the Study would not be completed within the agreed-to timeframe of 2001 March 31, the Union signed an agreement with the Company to an extension to 2001 October 1. A proviso was included that any adjustments as the result of upgradings for employees submitting a request for such since 1999 would be paid back to that year.

In 2001 October, the timeline to complete the Study again expired due to the lack of commitment of management resources, and a breakdown in cooperation. By now, the Union felt the Steering Committee had only been used as a tool to validate a Human Resources initiative and their results. The Union felt there were too many irreparable flaws in the process. The Union decided

to withdraw from the process and not legitimize the unilateral decisions of Human Resources and the Company, that the Study was reproducing gender bias, and that it would erode access to career development and otherwise violate the rights of the Union employees under the collective agreement.

On 2002 May 13, the Union filed another complaint (File No. 94010) (Appendix I) with the Canadian Human Rights Commission, which is yet to be heard.

In the initial agreement to extend the timeframe of the Study, the Company and the Union agreed to maintain the stability of job classifications and to postpone all requests for job upgrades until its completion. After the Union withdrew, the Union asked Human Resources to review all jobs that had been submitted for review prior to the agreement signed on 1999 December, as well as other positions requiring an upgrading since that time. Human Resources refused on the grounds that it lacked the resources for such an undertaking, and that all jobs were frozen until the review was complete. This was despite the fact that new jobs were being evaluated and posted on a regular basis, and that the Study should not have been completed following the withdrawal of the Union.

Although the Union had withdrawn from the Study, Human Resources continued with the Study, reviewing their results they had compiled with managers and senior managers. It was unclear what methodology was being used, because there is evidence to show that the results of the Study were being “dispositioned” in favour of budgetary and bureaucratic requirements, and that market studies may have been used to justify their eventual decisions. Market studies would introduce gender inequities and reverse progress attained in the past.

From the Union’s perspective, the results clearly showed that the Study results had not been used to measure many of the jobs. Many of the upgrades were assessed on factors outside of the classification review, such as skill sets and hierarchy.

Examples:

- A CM8 Project Assistant was upgraded to a CM9, even though she had not filled out a questionnaire. The manager justified this upgrade as natural progression because of the increase in her job skills. There is no job progression within the Union, and a classification upgrade was to be based on job duties, not the incumbent's skills.
- The CM8 Administrative Assistants (AA) in the Research & Product Development Division compiled a joint questionnaire. The evaluation showed that these AA’s should have been upgraded to a CM9, a position the manager justified. The Company determined that an upgrading for an AA was dependent on the manager's position (job ranking), and the study results were denied.
- CM7 Telephone Operators job questionnaires were reviewed, and the Study determined they would remain at the same classification level. The positions were upgraded contrary to the study, based on a manager’s assessment. Other jobs that had a higher level of responsibility, deliverables and job knowledge were not upgraded.

The Company, in effect, had abandoned the original methodology of the Study, ignored the decisions arising from the Steering Committee, and had taken unilateral action separate and apart from the Job Steering Committee. Female-dominated jobs at the Company have been impacted negatively as the result of the Company’s disregard for the agreed-to methodology of the Pay Equity Job Classification Study under the terms of the 1999 Settlement. The Company

abandoned the Study methodology by not allocating sufficient resources to adequately complete the process, by introducing delays in data-gathering, by not requiring management cooperation and participation, and by not abiding by the decisions and process determined by the joint Steering Committee. These actions have had, and potentially could have, a disproportionate impact on female-dominated job classes as opposed to their male-dominated counterparts with respect to promotion, wage scales and other rights based on job classification under the collective agreement. Faulty job classifications can only reintroduce pay inequities that discriminate on the basis of sex and will lead to violations under Section 11 of the Canadian Human Rights Act.

5.0 RECOMMENDATIONS

That there be independent, third party involvement as part of the governing body (i.e. Steering Committee) in the entire process and implementation of a study, as well as an independent audit at the completion of the study to determine lessons-learned.

That all resources, i.e. financial and labour, be provided by the corporation involved to ensure the accuracy of information, the adherence to the milestones and schedule, and the cooperation and participation of management and employees.

That a standard evaluation process, tools and score determination be devised and extensively tested for classification evaluation requirements.

6.0 AECL-CHALK RIVER NON-UNIONIZED EMPLOYEES

The Company precluded the non-unionized employees at its Chalk River site from participating in the Joint Pay Equity Study initiated by the Union on 1994 April 4. However, after numerous meetings between the Company and the non-unionized representatives, the Company agreed to provide pay equity adjustments to non-unionized employees in jobs comparable to bargaining unit employees receiving such adjustments.

Although not a party to the pay equity agreement or apprised of its contents, non-unionized employees were incorporated into the agreement executed between the Company and the Union for a joint company-wide Job Classification Review Study.

At the beginning of the Study, the Chalk River non-unionized representative expressed concern that non-unionized employees did not have any bargaining power, and that it was difficult to believe that any recommendations made by them would be considered. This concern was based on previous dealings with HR on issues raised by Chalk River non-unionized employees and the unsatisfactory results obtained.

HR provided a list of the Chalk River non-unionized positions to be included in the Study to the non-unionized representative on the Steering Committee. In total, 67 positions in the M-6 to M-11 salary range/job levels were eligible for review – 47 female incumbents and 20 male incumbents.

The history and chain of events up to and including the withdrawal of the Union from the Study are covered in the preceding sections and are fully endorsed by the non-unionized representative from the Chalk River site.

6.1 Chronology of Events

On 2001 October 23 the non-unionized representative at Chalk River was informed that the Union had pulled out of the Study, and that HR would like to continue and complete the Study. The non-unionized representative stressed that non-unionized Steering Committee members would have no bargaining power without the Union's participation, and noted that HR could implement results without the consensus of the Steering Committee. To date, only the clerical position representatives attended Steering Committee meetings.

A scaled-down Steering Committee meeting was called for 2001 November 15. The Steering Committee consisted of two HR representatives, the consultant and the non-unionized representatives from Chalk River and Sheridan Park (clerical positions only). HR advised us that the consultant had been "playing around" with five different weighting scenarios and that Scenario 4 was now being used. As 90% of the Study was now complete, the non-unionized representatives objected to the introduction of the new weighting scenario. They were advised that it was irrelevant whether they agreed or disagreed with the new weighting scenario so long as they understood why it was being introduced.

A Steering Committee meeting was called for 2002 February 20. The non-unionized representative for the technical/trades group at Sheridan Park rejoined the Steering Committee. We were advised that there was pressure from management to complete the study. The Company's Resource Management Working Group (RMWG) was asked to "assist" HR to close the Study by the end of 2002 March.

At this point, the management review was one-half complete. It was noted that management had not reviewed the non-unionized "technical" group at Chalk River, consisting of Powerhouse Supervisors, Security Sergeants, Fire Captains and Laboratory Supervisors. The reason given: these groups have been a problem (salary range/job level) for the past 15 years, and if we go to their managers, they will say to upgrade them. However, if we do this, it will cause a ripple effect up the line and the foremen will be upset. The non-unionized representative expressed concern and pointed out that these people had scored extremely high in the Study and deserved to undergo management review, and asked for management feedback at the next meeting.

Further meetings were scheduled for 2002 March 7 and 8 to review results and to provide further management feedback.

The Steering Committee was advised that the results being provided were based on the recently introduced Scenario 4, not Scenario 2 as was used for 95% of the Study. At this meeting, the Steering Committee reviewed every position listed on the printouts provided by HR and provided comments as appropriate. Comments provided by some managers referred to "skill sets" of individuals, indicating that job incumbents were being reviewed, not the positions held by these individuals. HR was advised that this was contrary to the Terms of Reference of the Steering Committee.

It was again noted by the non-unionized representative from Chalk River that there was still no management feedback for the Chalk River “technical” group. The reason provided was that it was difficult to get the three managers in the same room for a discussion. It was further stated by HR that the HR Advisor responsible for this group indicated that he would possibly “give” the non-unionized representative one upgrade for that group, but not all. The implemented results showed that HR did, in fact, “give” the non-unionized “technical” group at Chalk River one upgrade.

It was becoming increasingly clear that the results gathered from the Study were being thrown out in favour of the HR, RMWG and the Company's management review. For example, some Administrative Assistant (AA) positions at Chalk River received higher scores than those at other Company sites. Instead of implementing the results of the study, management assumed that each AA position company-wide should be assigned the same level of responsibility. The level for an AA working for a branch manger would be classified as a C(M)-8; M-9 for a division director, and M-10 for a general manager. With this decision, the Company introduced job ranking, the process used by HR and management for positions prior to the classification study.

The Steering Committee met again on 2002 April 2. The agenda did not differ much from a previous meeting to discuss the final review, and resulting feedback. At this meeting, there was very little new information presented. A spreadsheet with the revised results to be implemented was not provided for the Steering Committee member's review prior to the meeting, so the discussion was not productive or useful. The non-unionized representative for Chalk River inquired as to whether management feedback had been received for the “technical” group at Chalk River. The answer was “no”. At this point, HR was advised that since there was no value to be gained by continuing to participate on the Steering Committee, the Chalk River non-unionized group was withdrawing from the Study effective immediately.

6.2 Recommendations

An independent, unbiased third party accountable to the President and CEO of the Company, oversees the entire Study from beginning to implementation. The “independent”, unbiased third party should not be a consultant hired by, accountable to and compensated by HR.

Management buy-in should be established prior to the formation of the Steering Committee and a management representative should be a member of the Steering Committee.

The Company should make sufficient financial and labour resources available to ensure that no short cuts are taken or steps arbitrarily removed from the process to save money, time or to expedite implementation.

The Study should be free of management interference by such committees as the Organizational Management Team (OMT) or the RMWG.

APPENDIX A: PAY EQUITY SETTLEMENT BETWEEN O.P.E.I.U. LOCAL 404 AND
AECL, 1997 OCTOBER 7

MINUTES OF SETTLEMENT
BETWEEN

ATOMIC ENERGY OF CANADA LIMITED
("AECL")

-and-

LOCAL 404 of the OFFICE & PROFESSIONAL EMPLOYEES
INTERNATIONAL UNION (AFL-CIO and CLC)
("LOCAL 404")

Whereas a pay equity complaint was filed 1994 April 04 by Local 404 with the Canadian Human Rights Commission (File No.X00467) with respect to the non-payment by the Company of sufficient funds to close the wage gap in 1993, 1994, 1995 and 1996 and other matters, the parties agree as follows in resolution of all matters in question for these years:

1. Payments

The Company will make pay equity payments to all employees in female dominated jobs ("employees") as described below. Female dominated jobs are, as described by the Equal Wages Guidelines, 1986, Section 13, those jobs at or below the CM10 range which have 70% or more of the incumbents being female on the respective dates below.

(A.) For 1993, wherein employees did not receive full pay equity adjustment, employees on strength on 1993 July 01 will receive a lump sum amount, not added to base salary, equal to 3% of the average salary of all employees in both their salary range and the equivalent M-scale salary range. In the case of red-circled employees, this amount will be paid as a lump sum payment, not added to the base salary, to the extent that the lump sum when added to their salary does not exceed the range top plus 5%.

(B.) For 1994, wherein employees did not receive any pay equity adjustment, employees on strength on 1994 July 01 will receive a lump sum amount, not added to base salary, equal to 5% of the average salary of all employees in both their salary range and the equivalent M-scale salary range. In the case of red-circled employees, this amount will be paid as a lump sum payment, not added to the base salary, to extent that the lump sum when added to their salary does not exceed the range top plus 5%.

(C.) For 1995, wherein employees did not receive any pay equity adjustment, employees on strength on 1995 July 01 will receive a lump sum amount, not added to base salary, equal to 5% of the average salary of all employees in both their salary range and the equivalent M-scale salary range. In the case of red-circled employees, this amount will be paid as a lump sum payment, not added to the base salary, to extent that the lump sum when added to their salary does not exceed the range top plus 5%.

(D.) For 1996, wherein employees did not receive full pay equity adjustment, employees on strength on 1996 July 01 will receive a lump sum amount, not added to base salary, equal to 3% of the average salary of all employees in both their salary range and the equivalent M-scale salary range. In the case of red-circled employees, this amount will be paid as a lump sum payment, not added to the base salary, to extent that the lump sum when added to their salary does not exceed the range top plus 5%.

2. Payment schedule

The payments outlined in clause 1 will be made by 1997 November 10.

A payment for the period 1997 July 01 to 1998 June 30 will be made by 1998 February 28.

In the interim, AECL agrees to administer the salaries of employees in the CM 6 to CM 10 ranges from 1998 July 01 and until the study described below is completed and wage adjustments, if necessary, are calculated and implemented, in the following manner:

(A.) in case where no remuneration pursuant to Article 22.02 of the collective agreement is paid, employees on strength on July 01 of any given year, will receive a lump sum amount, not added to the base salary, equal to 5% of the average salary of all employees in both their salary range and the equivalent M-scale salary range. In the case of red-circled employees, this amount will be paid as a lump sum payment, not added to base salary, to the extent that the lump sum when added to their salary does not exceed the range top plus 5%.

(B.) in case where remuneration pursuant to Article 22.02 of the collective agreement is paid to employees, the employees on strength on July 01 will receive a lump sum amount, not added to the base salary, equal to the difference between the remuneration paid pursuant to article 22.02 and 5% of the average salary of all employees in both their salary range and the equivalent M-scale salary range. In the case of red-circled employees, this amount will be paid as a lump sum payment, not added to base salary, to the extent that the lump sum when added to their salary does not exceed the range top plus 5%.

These payments shall be made in the pay periods closest to July 01 each year beginning in 1998.

3. Release

Local 404, for itself and on behalf of its members, hereby remises, releases and forever discharges AECL, its associated and affiliated companies, as well as their directors, officers, shareholders, agents, representatives, employees, successors and assigns from any and all claims, demands damages, causes of action, actions or losses of any nature whatsoever which Local 404 or its members have or may have relating to, directly or indirectly, pay equity, in respect of any period prior to 1997 January 01.

4. Pay equity study

AECL and OPEIU Local 404 agree to cooperate on a pay equity study, with AECL covering the costs thereof. The aim of this study will be to ensure, for the period of 1997 January 01 forward, that employees in predominantly male and predominantly female occupational groups receive equal pay for work of equal value in accordance with the *Canadian Human Rights Act* and the *Equal Wages Guidelines, 1986*.

The parties will meet on 1997 October 24, with a pay equity specialist and Commission representatives, to discuss Terms of Reference for the study. These Terms of Reference will be finalized no later than 1997 December 05, and will specify:

- the scope of the study,
- how the study will be managed (e.g., the composition of a steering committee), and
- a schedule of milestones for key steps of the study, completion of the study, and the payment of any resulting adjustments.

The parties agree that if the study reveals that ongoing payments have not closed the entire wage gap, adjustments will be for the period of 1997 January 01 forward, and if the study reveals that the payments have exceeded the sums required to close the wage gap, reimbursement will not be sought.

5. Decision-making and dispute resolution

Decisions related to the pay equity study will be made on the basis of agreement between AECL and Local 404, with the assistance of the pay equity specialist, unless the issues in question clearly do not have any real or potential impact on Local 404 members. The parties agree that good-faith efforts will be made to reach such decisions before either of the steps described below is taken.

In cases where a mutually agreeable decision cannot be reached, as described in the preceding paragraph, the advice of the Commission will be sought.

In cases where the advice of the Commission does not result in a mutually agreeable decision, either party may submit its views to a pay equity expert recommended by the Commission for a binding decision. The total amount of time from the date of the Commission's recommendation to the date on which a binding decision is released shall not exceed 30 days. The total amount of billable time spent by the expert in obtaining views and issuing a decision shall not exceed the equivalent of 20 days per referral. Where a binding decision is sought by AECL, it shall pay the expert's fees. Where a binding decision is sought by Local 404, 50 per cent of the expert's fees shall be paid by the Local, and 50 per cent shall be paid by AECL.


6. Agreement binding

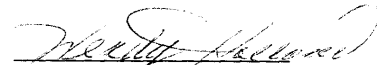
Local 404 hereby represents and warrants to AECL that this settlement will bind Local 404 and its members following ratification of the potential expenditures implicit in the preceding paragraph, which will be recommended at a meeting on 1997 October 14.


7. Submission to Commission

The Minutes of Settlement herein shall be submitted to the Canadian Human Rights Commission for approval at its December 1997 meeting.


Agreed this 7 th day of October 1997.


Jean Richer, Director
Employee Relations


Wendy Holland, President
Local 404, OPEIU


Witness:
Scott Streiner
Assistant Director, Pay Equity
Canadian Human Rights Commission

Approved by the Canadian Human Rights Commission at Ottawa this 15th day of December 1997, pursuant to subsection 48(1) of the Canadian Human Rights Act.


Cecile Blatte
Secretary to the Commission

APPENDIX B: JOINT PAY EQUITY STUDY AGREEMENT BETWEEN O.P.E.I.U. LOCAL 404 AND AECL, 1999 DECEMBER

MINUTES OF SETTLEMENT

BETWEEN: **ATOMIC ENERGY OF CANADA LIMITED**
(hereinafter referred to as "AECL")

AND: **LOCAL 404 OF THE OFFICE AND PROFESSIONAL EMPLOYEES INTERNATIONAL UNION (AFL-CIO AND CLC)**
(hereinafter referred to as "Local 404")

WHEREAS a pay equity complaint was filed April 04, 1994 by Local 404 with the Canadian Human Rights Commission (File No. X00467) with respect to the non-payment by the Company of sufficient funds to close the wage gap in 1993 – 1996 and other matters;

WHEREAS the parties entered into a memorandum of settlement dated October 7, 1997 (hereinafter referred to as the "Memorandum") and jointly participated in a pay equity study as contemplated by said Memorandum;

WHEREAS a pay equity wage gap has been identified as a result of the said pay equity study and the parties wish to finalize all matters arising from the Memorandum in accordance with its terms. In doing so, they agree to ensure

- the pay equity adjustments are separate from merit,
- that pay equity adjustments are added to base salary to close wage gaps now, and
- that the Occupational Group is to be defined as Local 404 and is female dominated and therefore adjustments are given to any jobs that are due an adjustment, in this case all jobs in ranges CM6-CM10.

THE PARTIES THEREFORE AGREE AS FOLLOWS:

1. DETERMINATION OF PAY EQUITY GAP

As a result of the analysis and conclusions drawn from the pay equity study completed in June 1999, the parties agree that a wage gap of 6.25% exists from January 1, 1997.

2. BACK PAY FOR 1997-1999

Local 404 recognizes that some pay equity adjustments have already been made by the Company for the period of January 1, 1997 to December 1, 1999. However, in light of the result of the pay equity study, the Company agrees to pay to all Local 404 members who were employees of the Company as of January 1, 1997, in the CM6-CM10 ranges an additional maximum lump sum payment, not added to base salary of \$3,686.00 (as set out in Appendix "A" hereto) for the period January 1, 1997, to December 31, 1999, proportional to the period worked by said employees between January 1, 1997 and December 31, 1999.

These payments are subject to normal statutory deductions, including pension and are to be made to current members by no later than December 2, 1999. These payments will be made by no later than January 27, 2000, on a proportional basis to the amount of time worked, to eligible persons who were members of Local 404 on January 1, 1997 but who are no longer members of Local 404.

3. PAY EQUITY ADJUSTMENTS

3.1 In recognition of the pay equity gap of 6.25%, the base salaries of current Local 404 members in the CM6-CM10 ranges will be adjusted by 6.25% (rounded to the nearest hundred dollars), effective January 1, 2000.

3.2 Effective January 1, 2000, the current range maximums for CM6-CM10 will be adjusted by 6.25%, rounded to the nearest hundred dollars, as set out in Appendix "B" hereto.

4. NEW CLASSIFICATION STUDY

As a result of the analysis and conclusions drawn from the joint Pay Equity Study completed in 1999 June, the Parties also agree that a classification review is required. The parties agree that AECL will undertake an overall classification review which will commence January 2000 and will be completed no later than March 31, 2001, with AECL covering the cost thereof. The parties further agree that where the process affects Local 404 positions, Local 404 will jointly participate with AECL in said classification review. Local 404 further agrees to participate, to the extent required by AECL, in the classification review of other positions outside of Local 404. The job questionnaire and the job evaluation standard developed for the Pay Equity Study will be used during this classification review. It is also agreed that the current CM6-CM11 range may need to be restructured and any new salary range structure resulting from the classification review will be effective July 1, 2001. In the event that any salary range is reduced resulting from said classification review, the parties agree that Local 404 members on strength on July 1, 2001, in such salary range will be red circled.

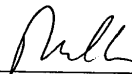
6. SETTLEMENT

Upon AECL's compliance with these Minutes of Settlement, Local 404, for itself and on behalf of its members, hereby acknowledges that AECL has fully complied with the terms and conditions of the Memorandum of Settlement dated October 7, 1997, and declares itself fully satisfied with the settlement of its complaint filed with the Canadian Human Rights Commission.

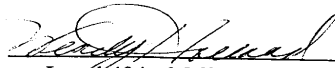
7. RELEASE

In consideration of AECL's compliance with the above undertakings, Local 404, for itself and on behalf of its members, hereby remises, releases and forever discharges AECL, its associated and affiliated companies, as well as their directors, officers, shareholders, agents, representatives, employees, successors and assigns from any and all claims, demands, damages, causes of action, actions or losses of any nature whatsoever which Local 404 or its members have or may have relating to complaint file #X00467 or the settlement thereof.

Signed at Deep River., this 26 th day of November 1999.



Per Atomic Energy of Canada Ltd.



per Local 404 of Office and Professional
Employees International Union

APPENDIX "A"

Calculation of Back Pay from 1997 January 01 to 1999 December 31

Wage Gap	6.25%
July 1 1997 Range Adj.	2.00%
July 1 1998 Range Adj.	2.00%
July 1 1999 Range Adj.	2.00%

	<u>Close Gap CM 8 Max</u>	<u>Current Situation</u>	<u>Pay Equity Pmts</u>
Jan 1 1997 CM 8 Range Max	34,200	34,200	488
Jan 1, 1997 Apply Wage Gap	36,300		
July 1, 1997 Range Adj of 2%	37,100	34,900	1,031
July 1, 1998 Range Adj of 2%	37,800	35,600	1,049
July 1, 1999 Range Adj of 2%	38,600	36,300	692
 Earnings			
1997 Jan 1 to 1997 June 30	18,150	17,588	
1997 July 1 to 1998 June 30	37,100	35,931	
1998 July 1 to 1999 June 30	37,800	36,649	
1999 July 1 to 1999 Dec 31	19,300	18,496	
Total	<u>112,350</u>	<u>108,664</u>	
Difference		\$ 3,686	

APPENDIX "B"**CM 6-11 SALARY RANGES**

Effective January 01, 2000

<u>CM</u>	<u>Minimum</u>	<u>Maximum</u>
CM 6	\$23,900	30,500
CM 7	23,900	34,200
CM 8	30,800	38,600
CM 9	34,600	43,400
CM 10	38,900	48,700
CM 11	41,400	51,800

APPENDIX C: JOINT CLASSIFICATION STUDY TERMS OF REFERENCE

Atomic Energy of Canada Limited
CM – M 6 – 11
Joint Classification Review and Renewal Study
TERMS OF REFERENCE
January 2000

Objective:

To complete a job classification review and renewal of CM/M 6 – 11 jobs.

Accountability structure:

The Steering Committee is comprised of:

- 2 representatives from local 404, Office and Professional Employees International Union,
- 1 representative from the Non Bargaining Unit, CRL
- 1 representative from the Administrative Communications Committee, SP,
- 1 representative from the Technical Communications Committee, SP,
- 1 representative from the Human Resources Services,
- 1 representative from Compensation,
- 1 representative from Management and
- 1 Classification Consultant

The Management Representative will act as Chairperson.
Alternates are permitted to participate, as required.

The Steering Committee

- Is responsible to determine the role, if any, for each group
- Is responsible for all processes and steps in the classification review study as outlined below
- May delegate work to working committees
- Will endeavour to make recommendations and decisions in a consensual manner

The consultant, Integrated Management Consulting,

- reports to the Steering Committee
- guides the process through to completion
- provides technical expertise and recommendations
- maintains and monitors overall project schedule
- completes steps or aspects of steps as delegated by the Steering Committee

Processes and Steps

Two processes will be jointly carried out throughout:

- a) Training
Training could include training of steering committee members (including alternates), working committees including evaluation committee(s), and employees (on completion of job information questionnaire)
- b) Communication

The following steps are required

1. Collect job information from job incumbents in all jobs in the target population; have it reviewed by supervisors.
2. Evaluate jobs in committee(s).
3. Recommend weights for the evaluation factors
4. Determine any necessary reclassifications or structural changes.

Timeframe:

The entire process is to be completed by March 31, 2001.

Duration	Milestones
2 – 3 months (completed by March 31, 2000)	Start-up activities including; Steering Committee training, establishing frameworks, other working committees, and other start-up decisions. Orientation sessions for coordinators from Whiteshell and Montreal. Establishing communication strategy and mechanisms and publishing of first communiqué.
1 to 3 months Information collection April 1 – May 31 Review and Screening completed by June 30. (completed by June 30, 2000)	Job information collection Includes orientation sessions for employees and collecting job information from employees and any review/screening.
2 to 3 months (completed by September 30, 2000)	Evaluation of jobs Training of committee(s), evaluation of jobs, setting of weights, and sore thumbing of results.
4 - 6 months (Completed by March 31, 2001)	Analysis of Results Specific and/or Structural changes where deemed necessary.

APPENDIX D: JOINT CLASSIFICATION STUDY MILESTONES SCHEDULE

Timeframe:

The entire process is to be completed by March 31, 2001.

Duration	Milestones
2 – 3 months (completed by March 31, 2000)	Start-up activities including; Steering Committee training, establishing frameworks, other working committees, and other start-up decisions. Orientation sessions for coordinators from Whiteshell and Montreal. Establishing communication strategy and mechanisms and publishing of first communiqué.
1 to 3 months Information collection April 1 – May 31 Review and Screening completed by June 30. (completed by June 30, 2000)	Job information collection Includes orientation sessions for employees and collecting job information from employees and any review/screening.
2 to 3 months (completed by September 30, 2000)	Evaluation of jobs Training of committee(s), evaluation of jobs, setting of weights, and sore thumbing of results.
4 - 6 months (Completed by March 31, 2001)	Analysis of Results Specific and/or Structural changes where deemed necessary.

PROJECT -JOINT CLASSIFICATION STUDY M/CM6-11**ACTIVITY****Completion Date****1. Preparation & Planning**

1.1 Set up Steering Committee

1.2 Confirm Contract

31-Dec-1999

1.3 Start-Up Meeting

15-Jan-2000

*Scope, mandate, terms of reference,
Schedule, roles responsibilities, deliverables*

1.4 Information Requirements

31-Jan-2000

1.5 Orientation Sessions

15-Feb-2000

Familiarization with comp., job evaluation

1.6 Information Sessions

31-Mar-2000

HRA's (1 each at SP, CRL)

*HRA's/Mgr briefing sessions at SP, Mtl, CRL
Ottawa*

Employee sessions (1 hr. per location)

1.7 Communication

31- Mar-2000

2. Data Gathering

2.1 Employee training on questionnaire

14- Apr-2000

2.2 Employees complete questionnaires

31-Mar-2000

2.3 Recruit Screeners (assume 10)	31-May-2000	
2.4 Train screeners	31-May-2000	
2.5 Complete screening of questionnaires	30-Jun-2000	
2.6 F/U with managers/supervisors	31-Aug-2000	
3. Evaluation		
3.1 Recruit Evaluators (assume 6x 4)	15-Sep-2000	
3.2 Train Evaluators (2 days) and assign teams	30-Sep-2000	
3.3 Conduct evaluation sessions (assume 10 days)	31-Oct-2000	
3.4 Conduct Sore thumbing	15-Nov-2000	
3.5 Validate ranking, clustering	30-Nov-2000	
4. Building Structure		
4.1 Apply factor weights and analysis	31-Dec-2000	
4.2 Validate with managers	31-Jan-2001	
4.3 Conduct market reference analysis	31-Jan-2001	
<i>Develop Job Profiles</i>		
4.4 Create salary ranges	28-Feb-2001	
4.5 Communicate results to managers/employees	31-Mar-2001	
5. Appeal Process		
5.1 Develop Appeal Process	31-Mar-2001	
5.2 Recruit and train members of Appeal panel	15-Apr-2001	
5.3 Conduct appeal and render decision	30-Jun-2001	
6. Missing Questionnaires		
6.1 Identify Missing Questionnaires	30-Jun-2001	
6.2 Train managers, HRA's and employees	30-Sep-2001	
6.3 Apply Job Profiles	30-Nov-2001	Managers, HRA's
6.4 Communicate results to employees/HR	15-Dec-2001	Mgrs
6.5 Audit classification results	29-Feb-2002	Audit Committee

APPENDIX E: JOINT CLASSIFICATION STUDY EMPLOYEE QUESTIONNAIRE

Thank you for completing this **Questionnaire**. This job classification and renewal exercise is important for AECL and the information you provide is crucial to a thorough and fair evaluation. This classification review and renewal exercise is about assessing the skill, effort and responsibility required to do jobs at AECL and each job’s working conditions. All jobs are assessed against the same set of criteria. In all cases, it is the **job**, not the performance of the **person** doing the job, that is evaluated

Please do not write on the back of the pages as this might be missed if the questionnaire is photocopied. Put any additional information on a separate sheet and attach it.

This questionnaire asks about the following aspects of your job:

- | | |
|------------------------------------|---|
| 1. Responsibility for Deliverables | 7. Responsibility for Coordinating Work |
| 2. Responsibility for Resources | 8. Responsibility for Fostering Relationships |
| 3. Job Knowledge | 9. Communication Skill |
| 4. Versatility/Multi-tasking | 10. Physiological Effort |
| 5. Work Challenges | 11. Physical Skill |
| 6. Working With and Through Others | 12. Environment/Hazards (both physical and psychological) |

Position Title: _____

If there is a short phrase or job title that you feel better sums up your work, please provide it here:

If **single incumbent** job:

Incumbent’s Name: _____ Phone: _____

Supervisor’s Name: _____ Phone: _____

If multiple incumbent job, please list all those who helped complete the questionnaire along with their supervisor’s name(s); include phone numbers for both. If there is one person who is serving as the spokesperson to answer questions from the job evaluation committee, please put an “*” by this person’s name.

First please give a brief overall summary of your job. Think about why your job exists, what it is designed to accomplish for AECL. Then go on to answer each question asked in terms of the “regular and continuing” aspects of work. Regular and continuing work refers to that which is an integral part of the job. Some regular and continuing aspects of a job may occur infrequently *such as working on special projects* but they do occur on a regular basis and so are parts of the job.

For those completing this questionnaire in groups, there will be unique aspects to the position you each hold. The purpose of this questionnaire is to evaluate the job that all your positions are a part of.

.1 Briefly describe the overall purpose of your job

.2 Briefly, using point form, describe each of the major duties you carry out. Begin with the most important.

If you have any questions about this questionnaire after the April/May questionnaire sessions, please call, fax or e-mail our consultant:

Susan Leff
(613) 523-5689
FAX: 613-523-5053
susan.leff@mondenet.com

1. RESPONSIBILITY FOR DELIVERABLES (PRODUCTS, SERVICES AND INFORMATION)

This factor measures the responsibilities involved in getting all kinds of deliverables, whether they be products, services and/or information, from the point of inception to their final users - either within or outside of AECL. This factor examines the responsibility of the job by looking at the potential impact the job could have on the deliverable and thereby the organization's success both in a positive and a negative sense. There are two variables to consider for this factor, the degree of accountability and the degree of probable impact. Since this factor looks at probable impact it includes consideration for any checks and balances in place. Deliverables could include; computer programs, operational documents, translation services, human resources services, financial records.

The product, service or information typically has a number of elements; development; production, and testing. In addition, there are other roles that contribute to the ability to get the product, service or information to the final user - for example, administration-type roles.

1.1 What are the products, services and/or information which your job is responsible for delivering?

1.2 Describe the controls on your work in the table below

CHECK ANY WHICH APPLY	POTENTIAL CONTROLS	WHEN YOU CHECK AN ITEM, PLEASE DESCRIBE THE CONTROL (E.G., AECL PROCEDURE, ACCOUNTING STANDARDS, BLUEPRINT)
<input type="checkbox"/>	a. Work is primarily controlled by a supervisor who checks for accuracy, quality and/or adherence to instructions. Or work is controlled by machine.	
<input type="checkbox"/>	b. Work is "controlled" by the need to conform to technical, professional or legal standards.	
<input type="checkbox"/>	c. Work is controlled by AECL rules or procedure and there is little opportunity for incumbent in this job to make exceptions (these are referred to someone else).	

CHECK ANY WHICH APPLY	POTENTIAL CONTROLS	WHEN YOU CHECK AN ITEM, PLEASE DESCRIBE THE CONTROL (E.G., AECL PROCEDURE, ACCOUNTING STANDARDS, BLUEPRINT)
<input type="checkbox"/>	d. Work is controlled by AECL rules or procedure and there is some discretion for the incumbent in this job to make exceptions.	
<input type="checkbox"/>	e. Work is controlled by AECL policies or objectives and discretion must be exercised.	
<input type="checkbox"/>	f. Work is controlled by broad AECL goals. Incumbents must be able to translate goals into specific objectives.	
<input type="checkbox"/>	g. Use own judgement and ingenuity to develop and interpret goals and guidelines in preparing deliverables.	

1.3 What, if any, are the specific controls on your job, e.g., supervision, audits, procedures and policies, inspections, customer complaints/compliments?

1.4 Describe the probable positive impact to AECL that the outcomes of your job could have, given the level of responsibility involved.

2. RESPONSIBILITY FOR RESOURCES

This factor measures responsibilities for all resources (except people) and includes budgets and other forms of financial resources in addition to physical assets (tools, equipment, and building) and includes information in tangible forms. The term “financial resources” is not linked to signing authority but rather recognition that all assets have a dollar value. The factor recognizes the responsibility employees have to work effectively with company assets and maximize their value. The two variables to be considered are degree of accountability and the degree of probable impact involved.

This factor also looks at the utilization and management of contractors from the perspective of the contracts not the people. The people involved are to be captured under the factor Working With and Through Others.

Do not consider the products or services delivered in this factor as that is measured under Responsibility for Deliverables.

Note this factor includes the administration of “Contractors”.

2.1 Indicate the non-human resources for which this job is responsible in the chart below.

ASSETS FOR WHICH YOUR JOB IS RESPONSIBLE	INDICATE KIND OF RESPONSIBILITY		
	USE & MAINTAIN	SCHEDULE OR ADMINISTRATION OF RESOURCE (I.E., ENSURE AVAILABILITY)	RESPONSIBLE TO MANAGE RESOURCES
FINANCIAL RESOURCES (ABILITY TO SPEND MONEY)			
EQUIPMENT & TOOLS			
SUPPLIES			
LARGE PHYSICAL ASSETS (E.G., FACILITIES) SPECIFY			
DATA SYSTEMS (I.E., PAYROLL; FINANCIAL RECORDS)			
OTHER (SPECIFY)			

2.2 Provide an example of the impact your job has with respect to its responsibility for resources (indicate who --other jobs or groups--are affected, any impact on operation; specify how much of your work unit, or a larger part of AECL is affected).

3. JOB KNOWLEDGE

This factor measures the level of job knowledge required to perform the job at a satisfactory level. It includes job-specific knowledge and any abilities required to perform particular methods and techniques. It does not matter how skills were or are obtained, for example, school or life experience. You are NOT being asked about your level of education or years of experience. Rather think about the skills needed to fill this job if it were vacant.

This factor measures the highest level of skill required on a regular and continuing basis by jobs and does not consider frequency of use.

3.1 List the 3 to 5 technical skills which are key to your job. Technical skills might be keyboarding, carpentry, finance, maintenance.

Then list the 3 to 5 organizational skills which are key to your job. Organizational skills could include setting your own priorities, setting up meetings for others and so on.

TECHNICAL SKILLS	ORGANIZATIONAL SKILLS
1.	
2.	
3.	
4.	
5.	

3.2 For each of the technical skills noted in 3.1, describe any aspects of your work in terms of the depth of knowledge required:

Basic: Knowledge of straightforward methods, facts or procedures.

Moderately complex: knowledge is used to apply principles or to interpret moderately complex methods and techniques, e.g., application of accounting principles, electrical wiring.

Specialized and/or highly complex: job requires working with theories and principles at conceptual level, e.g., thermodynamic principles, tax laws.

Place the technical skills from question 3.1 into the appropriate row below:

BASIC	
MODERATE COMPLEX	
HIGHLY COMPLEX	

3.3 What equipment, tools, software are you required to use in your job on a regular and continuing basis?

3.4 What, if any, continuous learning is required to maintain or enhance the skills necessary to perform your job? (Consider: professional reading, seminars, up-grading of skills on-the-job, etc.)

4. VERSATILITY/MULTI-TASKING

This factor measures the mental effort (fatigue) found in your job because of the regular and continuing requirement to “wear different hats”. These “hats” are different than the activities we do. All jobs require employees to engage in certain activities during the workday. Some of us hammer, others add columns of figures, others monitor, and some solve problems. The activities required (“shifting gears”) could be grouped under one or more “hats” we are required to wear to get our job done. This factor is going to ask you questions about the number of different “hats” you wear, and the number of activities or “gears” you engage in.

I.1 Describe what makes your job mentally fatiguing related to changing hats.

I.2 Describe what makes your job mentally fatiguing related to shifting gears.

I.3 Indicate how often you are required to change hats and switch gears in the chart below.

CHECK FREQUENCY OF CHANGING HATS	FREQUENCY LEVELS	CHECK FREQUENCY OF SHIFTING GEARS
<input type="checkbox"/>	Never	<input type="checkbox"/>
<input type="checkbox"/>	Infrequently; less than once per day	<input type="checkbox"/>
<input type="checkbox"/>	Occasionally, a few times per day or several times per week	<input type="checkbox"/>
<input type="checkbox"/>	Required frequently, many times a day	<input type="checkbox"/>

5. WORK CHALLENGES

This factor focuses on the mental effort required to deal with the demands of the work -- whatever it is; solving problems, accommodating change, dealing with the impact of unpredictable events including sudden deadlines. All jobs have some demand for change but the degree of the change required will vary between jobs. This measures mental fatigue, not the ability required or the impact of the results.

This factor is considering an aspect of the job that may not happen daily or even routinely but is a regular part of the job. For example, budgets are only done once per year, but they are done every year.

The issue of challenges is not reserved for problems only. Some job requirements that may be part of the day to day routine can still require creativity.

This factor measures the extent of the challenges and the frequency at which work challenges occur within a job.

5.1 Answer the questions in the table below by indicating the frequency with which each is part of your job and illustrating with an example:

What is being measured is the effort not accountability.	Check the column(s) that apply and illustrate:		
	MODERATE	CONSIDERABLE	ILLUSTRATE WITH EXAMPLE
a. Variety of the types of problems you must deal with in your job.	<input type="checkbox"/>	<input type="checkbox"/>	
b. Creativity (new ways of doing things) are required	<input type="checkbox"/>	<input type="checkbox"/>	
c. Seeking information from new sources (compared to existing sources/networks).	<input type="checkbox"/>	<input type="checkbox"/>	
d. Information/data must be analyzed.	<input type="checkbox"/>	<input type="checkbox"/>	
e. Solutions are not readily available.	<input type="checkbox"/>	<input type="checkbox"/>	
f. Solutions require challenging the status quo.	<input type="checkbox"/>	<input type="checkbox"/>	
g. Difficult to generate alternatives; no clear precedents or guidelines.	<input type="checkbox"/>	<input type="checkbox"/>	
h. Difficult to select between competing alternatives.	<input type="checkbox"/>	<input type="checkbox"/>	
i. There are opposing views and positions that affect the options and make solutions more difficult.	<input type="checkbox"/>	<input type="checkbox"/>	

5.2 Describe the demands of your job which are most mentally fatiguing. This may be due to challenges, problems, change, need to be creative, routine.

5.3 Describe any situations where you have had to use lateral thinking (thinking differently than before, also known as thinking outside of the “box”) not just logical thinking.

5.4 Provide an explanation of any work challenges that you have not been able to describe through any of the Work Challenges questions.

6. WORKING WITH AND THROUGH OTHERS

This factor values responsibility for human resources (people) that may be informal or formally required. Many jobs involve aspects of supervisory or managing responsibilities even if they do not have these elements officially designated. Many jobs require employees to provide training to others, or counsel employees regardless of their official titles. This factor measures the actual accountability for others that is regular and continuing.

Note this factor includes the management of "Contractors".

3.1 Check the statement which best describes your job AND indicate an example of a position for which your job is accountable.

<input type="checkbox"/>	1. <i>No accountability for Others</i> : Responsibility for dealing effectively with others but no accountability for them
<input type="checkbox"/>	2. Your job provides a guiding role, involves minimal control or authority. May involve showing co-worker how to do part or all of their job. Or may contribute to a <u>team</u> effort. If you check here answer (a) and (b) below: a. Give example of other positions to which your job provides training and guidance: b. Give an example of a committee/team on which your job has served:
<input type="checkbox"/>	3. Your job periodically reviews or monitors the work of those in other jobs against standards, specifications or instructions. Give examples of the other positions whose work is reviewed by your job on a regular and continuing basis:
<input type="checkbox"/>	4. Your job allocates work to others and reviews this work, typically setting the work requirements for others, i.e., lead hand. List the other jobs to which your job allocates and reviews work:

7. RESPONSIBILITY FOR COORDINATING WORK

Many jobs require some coordinating responsibility. This factor measures the nature of your coordinating responsibilities, the complexities and impact of the coordination responsibility.

The following is a **sample** list of elements to be coordinated:

- competing schedules, e.g., production where same equipment needed for different orders
- data flow such as budget information, year end results, survey answers
- substance/material flow
- information such as resumes or personnel files
- equipment such as audio/visual or testing equipment with users
- events such as conferences, picnics, meetings,
- processes or procedures, e.g., audit procedure, employee documentation procedure, product testing
- campaigns, e.g., communication, environmental, charitable
- employee expenses with receipts

7.1 Please **describe** your responsibilities for your coordinating work.

ELEMENTS TO BE COORDINATED	NATURE OF YOUR ACCOUNTABILITY	COMPLEXITIES AND IMPACT OF THE COORDINATION

8. RESPONSIBILITY FOR FOSTERING RELATIONSHIPS

Most jobs require some level of responsibility for interacting with people. The nature of the responsibility, however, can differ quite dramatically from one job to another. The following questions are designed to determine: the purpose and nature of this responsibility; who the contact is with; what type of informational needs are involved; and, the effects of your contacts. This factor excludes responsibility for subordinates or others that you lead, which is covered under Working With and Through Others.

This factor measures the responsibility for interacting with various types of people to the benefit of AECL. When answering the next questions in the table below, circle or cross out the chosen number if working on paper, if working electronically – either bold the chosen number or delete the other numbers.

3.1 The following are types of people *i.e.* personnel from various organizations that have a relationship with AECL

1. Suppliers
2. Internal Clients
3. Regulatory Agencies
4. External Clients (e.g. Federal Government, Industry and/or other countries)

Other – (please describe in the table below)

3.2 The following statements describe the nature of interactions that may be required

1. Sharing/Explaining (Giving and Taking Dynamic): both parties want to share information or be involved in the interaction.
2. Advising/Persuading/Influencing (One-way Dynamic): may involve discussion of the options and recommendation of the preferred choice.
3. Negotiating/Selling (Two-way Dynamic): required to communicate the benefits of a particular course of action, respond to counter-arguments, and arrive at a winning solution.

Other – (please describe in the table below)

8.1 CIRCLE OR HIGHLIGHT THE NUMBER TO INDICATE THE TYPE OF PEOPLE	8.2 CIRCLE OR HIGHLIGHT THE NUMBER THAT BEST DESCRIBES THE NATURE OF INTERACTION	8.3 DESCRIBE THE CIRCUMSTANCES
1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> Other - Please describe:	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> Other - Please describe:	
1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> Other - Please describe:	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> Other - Please describe:	

9. COMMUNICATION SKILL

This factor measures the skills required to communicate with people -- which are regular and continuing parts of your job. This factor is measured in two aspects. First, is the level of complexity of the information that is required to be verbally communicated in your job – speaking and listening. The second considers any requirements for textual communication – reading and writing.

Think of the information which is communicated in your job on a regular and continuing basis -- both verbally and in writing -- including text, schematics, graphs, data, financial statements, etc.

}.1 Describe the most complex verbal communications required in your job. Consider one-on-one exchanges, exchanges in groups, presentations, “translation” of technical material to laypeople, negotiations and so on. Indicate what makes this communication complex, e.g., the material itself, an unreceptive audience, technical jargon. Remember this section measures the SKILL required.

}.2 Describe the most complex listening inherent to your job. By “inherent” is meant that it is an integral part of your job. Indicate if it is something about the setting which makes it complex (e.g., having to listen past noise/frustration or the material which is complex). Remember this section measures the SKILL required.

}.3 Think of the material that you have to read and write in your job on a regular and continuing basis. Check off the items in the list below -- note one column is for what you have to read and the other is what you have to write and to whom. You are asked to give an example. Just leave the line blank if it is not part of your job. Remember this section measures the SKILL required.

	CHECK IF READ	CHECK IF WRITE & INDICATE AUDIENCE	GIVE EXAMPLES
1. TEXT -- FOR GENERAL AUDIENCE	<input type="checkbox"/>	<input type="checkbox"/>	
2. TEXT FOR SPECIALIZED AUDIENCE	<input type="checkbox"/>	<input type="checkbox"/>	

	CHECK IF READ	CHECK IF WRITE & INDICATE AUDIENCE	GIVE EXAMPLES
3. PROCEDURES	<input type="checkbox"/>	<input type="checkbox"/>	
4. BLUEPRINTS OR SCHEMATICS	<input type="checkbox"/>	<input type="checkbox"/>	
5. FINANCIAL REPORTS (I.E., BALANCE SHEET)	<input type="checkbox"/>	<input type="checkbox"/>	
6. TABLES AND GRAPHS (DATA)	<input type="checkbox"/>	<input type="checkbox"/>	
7. STATISTICAL RESULTS	<input type="checkbox"/>	<input type="checkbox"/>	
8. EVALUATE EXTERNAL REGULATIONS	<input type="checkbox"/>	<input type="checkbox"/>	
9. OTHER (SPECIFY)	<input type="checkbox"/>	<input type="checkbox"/>	

10. PHYSIOLOGICAL EFFORT (concentration and physical)

All jobs require concentration to varying degrees. Mental energy may be draining when above-average concentration is required. This does not relate to the entire day's work. This factor assumes that all employees are concentrating for their full working time, but on a variety of tasks and with breaks.

Similarly, all jobs require some kind of physical effort. Jobs may involve any number of different tasks that entail physical effort. Examples include lifting, carrying, pushing and climbing. Note that some jobs involve working without being able to move around or change positions to any great extent. Such jobs can be fatiguing simply because of the lack of opportunity to move. Examples include jobs that require sitting at a computer terminal or in a car all day, standing or operating equipment without being able to take breaks or change activity when desired. This factor will be measured using the two scales of intensity of demands and frequency/duration.

The following question is designed to capture the type of concentration. For example, do you have to focus or listen "hard" e.g., "listening" concentration - taking notes/information, detecting differences/problems; "visual" concentration - checking, reading, inputting, proofreading, detecting differences, noting nervousness? Do you get second chances if you miss something the first time? Is there variety to the day or monotony? Do the tasks require observing subtle differences and so on?

10.1 Describe the typical intensity of the concentration requirements. Try to describe the circumstances of the requirements for concentration and what it is about the requirements that are mentally fatiguing. Describe these tasks and indicate frequency and duration. Please note, the issue of duration refers to the time spent concentrating on a specific task.

10.2 Physical fatigue can be due to gross muscle movement (i.e. lifting) and to fine muscle movement (i.e. keyboarding). Fatigue can also come from the lack of movement (sitting on an airplane all day, for example, is tiring). What is being measured in this factor is the fatiguing effort of the tasks performed rather than the strength or energy needed to perform the task.

Job requires...	CHECK ONE COLUMN FOR EACH QUESTION		
	Little or Never	Occasionally: Once in a while on a daily basis or several times daily but not every day	Frequently; several times daily almost every day
a. sitting without being able to take a break except when relieved (no personal choice about going to the bathroom or choosing to engage in physical activity such as delivering something to someone else)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. standing on concrete or working in awkward position (i.e., correct typing position)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. climbing ladders and other such movement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Job requires...	CHECK ONE COLUMN FOR EACH QUESTION		
	Little or Never	Occasionally: Once in a while on a daily basis or several times daily but not every day	Frequently; several times daily almost every day
d. walking on uneven surfaces or on incline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. carrying, pushing, pulling or lifting -- specify amount of weight in kilograms or pounds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. repetitive physical movement (i.e., data entry)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. monitoring computer screen or other instruments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. driving car or van	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i. driving forklift, <u>lawn mower</u> or similar "vehicle"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j. Other, please specify:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10.3 Describe any fatigue that may result from the gross motor movement required in your job:

10.4 Describe any fatigue that may result from the fine motor movement (dexterity) required in your job:

11. PHYSICAL SKILL

This factor measures the skills required when using your hands, feet, or your whole body. Many jobs require physical skills to perform the functions assigned. The category of physical skills is comprised of manual skills, hand-eye/hand-foot coordination. Describe the precision, need for coordinated movements and any speed requirements. The following questions are designed to find out about how you use your hands, fingers, feet or whole body to perform your job.

Examples of activities that may require physical skills including precision, coordinated movements and/or speed:

- Keyboarding
- Calibrating instruments
- Assembling parts
- Manipulating the mouse
- Operating equipment and vehicles

Examples of equipment that may require physical skills including precision, coordinated movements and/or speed:

- Audio-visual equipment
- Calculator
- Computer keyboard
- Control panel knobs
- Design instruments
- Manual tools
- Power tools/equipment
- Electronic equipment
- Vehicle
- Welding machines

1.1 Physical skill activity (including any equipment operation requirements):

1.2 Please **describe** any precision of movement requirements.

1.3 **Describe** any co-ordination requirements.

1.4 **Describe** any requirements to maintain a certain speed while performing physical skill activities:

12. PHYSICAL AND PSYCHOLOGICAL ENVIRONMENT/HAZARDS

12.1 Use the list provided below to prompt you on possible psychological or physical conditions that are part of your working conditions on a regular and continuing basis. **Write the element number(s) in the box below according to the degree of severity and the frequency of exposure.**

If you are adding a new item please describe it enough for the evaluators to understand it.

When choosing a frequency option use the following definitions:

Occasional exposure: between 5% and 40% of the time

Frequent exposure: more than 40% of the time DEGREE OF SEVERITY	FREQUENCY OF EXPOSURE		DESCRIBE THE CIRCUMSTANCES
	OCCASIONAL	FREQUENT	
Minor irritants or inconveniences	<input type="checkbox"/>	<input type="checkbox"/>	
Bothersome conditions which are disconcerting	<input type="checkbox"/>	<input type="checkbox"/>	
Disturbing conditions that may require work aides but a high level of discomfort still remains	<input type="checkbox"/>	<input type="checkbox"/>	
PSYCHOLOGICAL ELEMENTS: 1. Deadlines controlled by another or others 2. Disagreeable, verbally abusive interactions with people 3. Dealing with upset, troubled people 4. Distractions 5. Multiple and competing demands 6. Isolation from co-workers 7. Interruptions 8. Knowledge that decisions will affect lives 9. Lack of privacy (open work area) 10. Monotony 11. Overnight travel 12. Potential threat to personal security 13. Cramped work space 14. Unpredictability of work 15. Burden of responsibility to protect confidentiality 16. Other (describe):		PHYSICAL ELEMENTS: 17. Chemical residue or odors 18. Fumes 19. Glare from computer screen 20. Grease/oil 21. Installation site noise 22. Machine noise (own) 23. Garbage 24. Office noise 25. Nuclear waste 26. Plant noise 27. Temperature extremes 28. Uncomfortable or cumbersome uniform or protective clothing 29. Various weather conditions 30. Other (describe):	

12.2 Use the list provided below to prompt you on possible hazardous conditions that are part of your working conditions on a regular and continuing basis. **Write the number(s) of the hazard in the box below according to the degree of severity and the frequency of exposure.**

If you are adding a new item please describe it enough for the evaluators to understand it.

DEGREE OF SEVERITY	FREQUENCY OF EXPOSURE		DESCRIBE THE CIRCUMSTANCES
	OCCASIONAL	FREQUENT	
Exposure to hazards which could result in moderate injury	<input type="checkbox"/>	<input type="checkbox"/>	
Exposure to hazards which could result in severe injury or death	<input type="checkbox"/>	<input type="checkbox"/>	3

- Hazards:**
1. Chemicals that cause chronic skin irritation, e.g., cleansers
 2. Equipment which could harm, e.g., table saw
 3. Exposure to radiation, e.g., lab equipment
 4. Hot items, e.g., ovens, soldering torch
 5. Noxious fumes, e.g., paints, cleaners
 6. Sharp tools or instruments, e.g., saws, Other (describe):

Now go back and read the description you have written. Have you used any abbreviations and/or jargon that is unlikely to be familiar to people who do not work in your area? If so, circle them in your description and define them here.

After you have completed the rest of the questionnaire you will be asked to add any aspect of your work which was not fully covered in the questionnaire, if there were any, add them here.

Thank you for completing this questionnaire. Your knowledge input on your job is essential to a good job evaluation.

To Be Completed by the Supervisor

Supervisor's Signature: _____

Date: _____

I have reviewed and agree

Or

Add Comments:

APPENDIX F: JOINT CLASSIFICATION STUDY JOB EVALUATION TOOL

Job Evaluation Plan

**Atomic Energy of Canada Limited
CM – M 6 – 11
Joint Classification Review and Renewal Study**

**Factor Package
Includes
Evaluation Factor Grids and Notes for Evaluators**

Job Evaluation Factors

SKILL

1. Job Knowledge
2. Communication Skill
3. Physical Skill

EFFORT

4. Versatility/Multi-tasking
5. Work Challenges
6. Physical Effort

RESPONSIBILITY

7. Deliverables
8. Resources
9. Working With and Through Others
10. Fostering Relationships
11. Co-ordination

WORKING CONDITIONS

12. Physical and Psychological Environment/Hazard

SKILL FACTORS:

- looking at focus of job
ie variability instead
of amount of knowledge
required for job

**JOB KNOWLEDGE
NOTES FOR EVALUATORS**

This factor measures the level of job knowledge required to perform the job itself at a satisfactory level. When using this factor it is very tempting to think in terms of the qualifications of the current employee or what the ideal candidate should possess. This should not be done. Rather, think in terms of the skills required in the job even if the job were vacant or if a competent incumbent held the job. This factor focuses on the skills required rather than where and how an employee might have attained the skills for the very reason that the focus is on the job requirements not individual employees' characteristics.

This factor measures the highest level of knowledge required by jobs and does not consider frequency of use.

Complexity and breadth are measured as noted below.

Complexity refers to the degree to which the work is complicated. This often relates to the depth of knowledge required.

Complexity (depth) degree definitions:

Minimal: Basic skills and knowledge are required. The Knowledge is restricted to straightforward methods, facts or procedures. Work has clearly defined by task outlines.

Moderate: Knowledge required for application/interpretation of moderately complex methods and techniques. Operates without task outlines.

Substantial: Skills and knowledge are specialized and highly complex. Knowledge required for creating/developing task outlines. The knowledge requirements include theories, concepts and/or principles.

Breadth refers to the variety of topics/subjects employees must know. Some jobs need to know a little bit about a lot of things and others need to know a lot about a few things.

Breadth degree definitions:

Narrow: Range of knowledge is restricted to similar topics.

Moderate: Requires knowledge of a wide range of topics in limited subjects

Broad: Requires knowledge of a wide range of subjects.

JOB KNOWLEDGE - Donna Hogue
FACTOR GRID

This factor measures the level of knowledge required to perform the job, i.e., how much employees must know to do the job. It includes job-specific knowledge and any abilities required to perform particular methods and techniques. It does not matter how skills were or are obtained, for example, school or life experience. The variables being measured in this factor are complexity and breadth of the knowledge required to perform the job.

COMPLEXITY	BREADTH		
	Narrow	Moderate	Broad
Minimal	Level 1	Level 2	Level 3
Moderate	Level 2	Level 3	Level 4
Substantial	Level 3	Level 4	Level 5

**COMMUNICATION SKILL
NOTES FOR EVALUATORS**

Verbal Communication: should be measured according to the highest level of complexity of the information that must be spoken or listen to and understood that is normally required in the job.

Verbal Communication degree definitions:

Straightforward: Factual, straightforward information

Moderate: Factual and complex or conceptual, somewhat complex

Complex: Conceptual, specialized terminology

Textual Communication: should be measured according to the highest level of complexity of the information that must be written or read that is normally required in the job.

Textual Communication degree definitions:

Straightforward: Factual, straightforward information

Moderate: Factual and complex or conceptual, somewhat complex

Complex: Conceptual, specialized terminology

**COMMUNICATION SKILL
FACTOR GRID**

This factor is designed to measure the skill requirements for communication verbally and in textual form.

VERBAL COMMUNICATION COMPLEXITY (includes speaking and listening)	TEXTUAL COMMUNICATION COMPLEXITY (includes writing and reading)		
	Straightforward	Moderate	Complex
Straightforward	Level 1	Level 2	Level 3
Moderate	Level 2	Level 3	Level 4
Complex	Level 3	Level 4	Level 5

**PHYSICAL SKILL
NOTES FOR EVALUATORS**

This factor measures the physical skills required to perform the job. Some jobs have requirements to do intricate or detailed work; others may be required to perform repetitive movements needing hand/eye or hand/foot coordination. Physical skills look at the combination of coordination and speed. This factor, like all other factors, ignores individual performance and looks only at what the job requires for satisfactory performance.

Physical skills are often related to the operation of equipment or machinery or the use of tools, such as computer keyboards. Other manual manipulations include assembling parts and components.

This factor does not consider the strain of the physical activities in terms of energy required which would be measured under Effort. (Certain tasks may require a high degree of skill but they are not in the least bit tiring, or little skill but they are exhausting.)

Base level: Tasks do not require any particular coordination; this usually means equipment is not used or need not be used with any degree of precision of movement

Degree of Coordination measures the degree of dexterity or control over motor activities. The motor activities may involve one or more of fingers, hands, feet, arms or legs, and their coordination.

Degree of coordination degree definitions:

Moderate: Tasks require some specialized movements or combination of body parts to be moved together

All keyboarding skills above basic, this includes data entry skills involving both text and numbers (example: timesheet coordinator, main frame operation, help desk, text processing, admin. assistance, etc. Mi2).

Advanced: Tasks require highly specialized and usually somewhat unnatural body part movements or combination of parts moving together in a precise manner

The use of tools and instruments that require precision and precise movement (ex: dealing with liquid nitrogen Ma4, hot gluing/soldering) - fine motor skills required for these. Emergency response - coarse motor skills required.

Speed measures the skill of processing quickly or performing tasks at varying degrees of speed. Some jobs require precise movements with a high level of coordination, but not speed because precision cannot be compromised. In other jobs, coordination for precise movements is not a priority but maintaining a high speed of processing is important.

Speed degree definitions:

Minor: Speed is not important or only average, natural speed is required

Use of instruments such as microscope, calibration tools, etc. Doc. services/text processing/data entry skills/keyboarding. Technicians

Major: Speed is important and training is usually necessary to accomplish the speed

Use of precision tools Ma4, handling liquid nitrogen, hot glue & soldering (once you start the time factor is important for completion).

Firefighters, security personnel (guards), emergency response services, technicians depending upon work involved.

**PHYSICAL SKILL
FACTOR GRID**

This factor measures the amount of physical skill including manual dexterity, hand-eye or hand-foot coordination required to perform the job functions. Manual dexterity refers to hand and finger manipulations requiring coordination and sometimes speed. Consider both fine and coarse movements. The variables on this factor are speed and coordination.

DEGREE OF COORDINATION	SPEED		
	Base – Level 1	Minor	Major
Moderate		Level 2	Level 3
Advanced		Level 3	Level 4

EFFORT FACTORS:**VERSATILITY/MULTI-TASKING
NOTES FOR EVALUATORS**

This factor is a subset of Effort as it requires varying degrees of mental energy to be versatile/flexible. This factor looks at the different types of roles that employees are required to perform in order to fulfill their jobs. This factor considers the variety of roles and the degree to which the roles must be switched.

Base level: Single focus - activities share the same focus

Variety of Focus of Activity measures the degree of similarity or difference between the tasks or roles that must be performed by jobs. Some jobs require employees to wear a number of so-called "hats" when performing their job or to change from one activity to another, which is quite different. In some organizations the combination of roles required in one job can be very different in nature, while other jobs may have a variety of roles all from the same family of things. For example, one job may require clerical, medical, housekeeping and psychological roles to be performed, while other jobs may require all maintenance roles though the use of different equipment is required.

Variety of Focus of Activity degree definitions:

Similar: Activities are from the same functional family and the activities are somewhat similar.

Various: Activities are from the same functional family but the activities are different.

Different: Different family of functions e.g. programming and financial.

Frequency of Switching Focus looks at the frequency of changing hats or roles. It measures the adaptability required and the mental effort that is caused by having to switch functions/activities.

Frequency of Switching Focus definitions:

Limited: Switching of focus is done infrequently.

Moderate: Switching of focus is required occasionally.

High: Switching of focus is required frequently.

**VERSATILITY/MULTI-TASKING
FACTOR GRID**

This factor measures the amount of versatility/flexibility jobs require and the resulting mental effort. One variable looks at the variety of functions (Focus of Activity) that are required by a job and the other measures the frequency with which this occurs (e.g., changing "hats", shifting from one mindset to another).

FREQUENCY OF SWITCHING FOCUS		VARIETY OF FUNCTIONS		
	Single focus: Level 1	Similar (same role/similar activities)	Various (same role/different activities)	Different (different roles)
Limited		Level 2	Level 3	Level 4
Moderate		Level 3	Level 4	Level 5
High		Level 4	Level 5	Level 6

WORK CHALLENGES NOTES FOR EVALUATORS

This factor is a subset of Effort and the focus is on the mental effort required for thinking - to deal with the demands of the work be they solving problems, accommodating change or the impact of unpredictable events including sudden deadlines. All jobs have some demand for change but the degree of the change required will vary between jobs. This factor is an Effort factor, and as a result it is measuring the mental drain of the mental demands, not the ability required or the impact of the results.

This factor is considering an aspect of the job that may not happen daily or even regularly but should only be considered if it is definitely part of the job requirements. It is not measuring individual capability; as with all other factors, it is only capturing job requirements. The issue of challenges is not reserved for problems only. Some job requirements that may be part of the day to day routine can still require creativity. The balance between ideal theory and pragmatic realities of limited time and resources requires creative solutions on a regular basis.

This factor measures the extent of the challenges and the frequency at which work challenges occur within a job. If the extent of challenges is variable, take into consideration the complete circumstances of the job or its 'overall package', not just the peak efforts. When rating – consider the extent of challenges first, then frequency.

Effort required by thinking! Not stress or feelings (under psychological)

When coding variables "Extent of Challenges" will be considered first - then frequency.

This is an effort factor and therefore does not address "feelings", which is covered under Psychological Conditions.

Extent of challenges degree definitions:

Minimal: Activities, problems or challenges require minor adjustment of situation or a change of perspective. Solutions are known.

Solutions are known. (May require search, i.e. fairly quick fix).

Reorganization change is NOT a job requirement unless you are managing the actual logistics of the change. I.e. RC #'s changing on timesheet = known solution, get new number.

Produce reports / create forms...

Lessons learned

Moderate: Activities, problems or challenges require specific solutions or processes that may not be readily available.

(Takes more than a call to find the solution / not a quick fix).

FIND the solution, may include tweaking the solution / process / part of team seeking a solution

AUDIT / Troubleshoot / Reconciliation of information / project (looking for errors...causes of failures...balancing...)

Substantial: Activities, problems or challenges require fundamental changes or improving existing processes. There may be difficult barriers or winners and losers to various options at this level adding to the mental effort.

Create / develop the process improvement

Create parts or tools or simple applications or simple programming in order to get the job done

Analyze info / project (looking for trends...). Add value = conclusions / recommendations / solutions

Extensive: The activities, problems or challenges at this level may require lateral thinking and changes in mind-set to arrive at any resolution or changes that are necessary. There may be significant obstacles to solutions at this level including opposing views and positions, which greatly affect the options and make solutions more difficult.

*Thinking during emergency or highly unusual circumstances, System programming, Round the clock decisions / demands
Make "life and death" decisions*

Frequency refers to how often the work challenges are likely to occur

Frequency degree definitions

Occasional: Once in a while over a period of time, i.e. once in a while on a daily basis or several times daily but not every day

Frequently: Often over a period of time such as several times daily almost every day

**WORK CHALLENGES
FACTOR GRID**

This factor measures the effort required in jobs as a result of the work challenges. All jobs require some degree of creativity. The variable to be measured in this factor is the extent of problems or challenges requiring creativity.

FREQUENCY	EXTENT OF CHALLENGES			
	Minimal	Moderate	Substantial	Extensive
Occasionally	Level 1	Level 2	Level 3	Level 4
Frequently	Level 2	Level 3	Level 4	Level 5

PHYSIOLOGICAL EFFORT NOTES FOR EVALUATORS

The purpose of this factor is to measure the frequency and intensity of physical demands on the job (*e.g.*, lifting, pushing or pulling objects, bending, supporting things), as well as to consider the physical fatigue caused by sensory demands (*e.g.*, watching or listening intently). Some jobs require little or no body movement but the demands for visual or auditory concentration are exhausting; similarly, the requirement to hold still or to work in an awkward or uncomfortable posture can be physical fatiguing (*e.g.*, keyboarding).

When evaluating jobs on this factor, consider the use of small muscle groups as well as large muscle groups, the need for movement as well as the need for stillness. Effort is also expended in the requirement to concentrate intently with one or more senses. Assess the effort involved in the tasks performed, rather than the strength or fitness needed to perform the task. If the requirement for physical effort is variable, take into consideration the complete circumstances of the job or its 'overall package', not just the peak efforts.

Two examples of concentrated focus; minute taking where the meeting is such that the minute taker cannot leave or break or re-verify details at some later time and transcribing information or discussion details rather than final results or outcomes

Base level: Mixture of physical and sensory activities, usually of low intensity.

Intensity measures the **intensity** and fatiguing nature of the physical and/or sensory effort typically required.

While the idea of different intensities of *physical* work is very familiar, keep in mind that *sensory* demands can also vary in intensity - *e.g.*, scanning e-mail versus reviewing computer code with attention to small details; tasks that are carried out 'real-time' with no second chances if something is missed. It can also include subtle phenomena being observed - this can be thought of as having to listen "harder" or watch more closely (*e.g.* machine maintenance or interviews requiring sustained *visual* or *auditory* attention).

Intensity degree definitions:

Moderate: Moderate sensory effort and limited physical effort **OR** moderate physical effort and limited sensory effort.

High: Intense sensory effort and limited physical effort **OR** Intensive physical effort and limited sensory effort **OR** moderate sensory and moderate physical effort.

Very High: *Very intense* sensory effort and moderate physical effort **OR** very intense physical effort and moderate sensory effort.

Frequency refers to how often the physical effort is required

Frequency degree definitions

Occasional: Once in a while over a period of time, i.e. once in a while on a daily basis or several times daily but not every day

Frequently: Often over a period of time such as several times daily almost every day

**PHYSIOLOGICAL EFFORT
FACTOR GRID**

The purpose of this factor is to measure the frequency and intensity of physiological demands of the job. It considers physical and sensory demands. Consider the 'package of physiological demands on each job.

FREQUENCY		INTENSITY		
	Base: Level 1	Moderate	High	Very High
Occasionally		Level 2	Level 3	Level 4
Frequently		Level 3	Level 4	Level 5

RESPONSIBILITY FACTORS:

**RESPONSIBILITY FOR DELIVERABLES
NOTES FOR EVALUATORS**

- distribution doesn't look right.
- ranking by hierarchy
- not using standard fully → too conservative
- present jobs to be included in levels?

This factor measures job responsibilities in relation to the product and its production process. The level of responsibility will be measured using two variables -- degree of accountability, and the probable impact of the responsibilities. Since this factor looks at probable impact it includes consideration for any checks and balances in place. When evaluating jobs against this factor, include all aspects related to getting the deliverable completed. Deliverables could include computer programs, operational documents, translation services, human resources services, or financial services.
Impact could be internal or external to AECL.

Degree of Accountability measures the degree to which a job is answerable for developing, producing and testing and so on. Some issues to consider are whether: employees must report or account for their decisions/actions; there are standards, which they are expected to meet; results, can be attributed to a position, a team or chance.

Degree of accountability degree definitions:

- Some:** Verbal or written guidelines to follow with minimal room for judgment. (Worked is checked by others. Direction or supervision is given, e.g., office assistants, clerks, technicians.)
- Moderate:** Expected to make recommendations and decisions within boundaries. Takes action and makes decisions. Problem solving and trouble shooting has implied decision-making. Positions include Help Desk, specialists, coordination roles, Executive Assistants
- High:** Jobs at this level have significant authority to make decisions and are accountable for those decisions. The decisions require judgment.
- Sole responsibility.** Making day to day decisions. Supervision of group. Jobs include function at Port Hope

Degree of Probable Impact measures the probable impact - positive and negative, that jobs could have, given the level of responsibility involved. When rating on this variable, be sure to look at impact that is real and measurable. This is one variable where bias could easily result, so it must be used carefully and sensitively. Do not exaggerate or minimize probable impact. Look for real examples and document reasons.

Degree of probable impact degree definitions:

- Low:** Deliverable has some impact internal to AECL usually restricted to oneself or work group. Consequences such as small savings/costs or faster service.
- Some impact to AECL.** Restricted to oneself, own work group or small group within branch. Jobs include General Administrative, Clerical, Mail etc.
- Moderate:** Deliverable has a moderate impact internal to AECL OR some impact external to AECL. Time and resources costs or savings, customer appreciation or irritation/inconvenience.
- Impact to AECL (finance, payroll, purchasing, HR) or some external impact.** Jobs include technicians, payroll, financial
- High:** Consequences likely to cause a good customer relationship/customer dissatisfaction or problem-free/problematic deliverable.

Commercial work for large customer accounts. Could affect future contracts, suppliers. Jobs include HR specialists, Payroll Data Entry, Technicians

Very High: Directly related to the operations of a large group of people and could have either a positive or negative impact on their ability to function.

Impact affects organization or the environment, e.g., emergency services, safety of people and property etc. Jobs include security, fire chief, environmental technician

**RESPONSIBILITY FOR DELIVERABLES
FACTOR GRID**

This factor measures the responsibilities involved in getting all kinds of deliverables whether they be products, services and/or information, from the point of inception to their final users -- either within or outside of AECL. This factor examines the responsibility of the job by looking at the potential impact the job could have on the deliverable and thereby the organization's success both in a positive and a negative sense. There are two variables to consider for this factor, the degree of accountability and the degree of probable impact.

DEGREE OF ACCOUNTABILITY	DEGREE OF PROBABLE IMPACT			
	Low	Moderate	High	Very High
Some	Level 1	Level 2	Level 3	Level 4
Moderate	Level 2	Level 3	Level 4	Level 5
High	Level 3	Level 4	Level 5	Level 6

RESPONSIBILITY FOR RESOURCES NOTES FOR EVALUATORS

This factor measures responsibilities for all non-human resources and includes budgets and other forms of financial resources and all kinds of assets no matter their form, including information in tangible forms. The term, financial resources, is not linked to signing authority but rather a recognition that all assets have a dollar value. The factor recognizes the responsibility employees have to work effectively with company assets and maximize their value. Many jobs have responsibility for some asset or financial resource but to varying degrees. The two variables to be considered are degree of accountability and the degree of probable impact involved.

Do not consider the products or services delivered in this factor as that is measured under Responsibility for Deliverables. This factor also looks at the utilization and management of contractors from the perspective of the contracts not the people. The people involved are to be captured under the factor Working With and Through Others.

Nature of Accountability measures the degree to which a job is answerable. Some issues to consider are whether: employees must report or account for their decisions/actions; there are standards, which they are expected to meet; results, can be attributed to a position, a team or to chance.

Nature of accountability degree definitions:

Use: Responsible for safe and proper use of company assets and ensuring they are maintained in good order.

Administration/Purchasing: Responsible for the administering, purchasing and/or the administration of resources to ensure availability.

Allocate/Schedule: Responsible for making effective use of limited resources to achieve maximum results.

Degree of Probable Impact measures the probable impact - positive and negative, that jobs could have, given the level of responsibility involved. When rating on this variable, be sure to look at impact that is real and measurable. This is one variable where bias could easily result, so it must be used carefully and sensitively. Do not exaggerate or minimize probable impact. Look for real examples and document reasons.

Degree of Probable Impact degree definitions:

Minor: Limited impact, usually restricted to oneself or work group.

Moderate: Could impact on another group.

Major: Could impact on a large group of people.

**RESPONSIBILITY FOR RESOURCES
FACTOR GRID**

This factor measures responsibilities for all non-human resources and includes budgets and other forms of financial resources and all kinds of assets no matter their form. Many jobs have responsibility for some asset or financial resource but to varying degrees. The two variables to be considered are degree of accountability and the degree of probable impact involved.

NATURE OF ACCOUNTABILITY	DEGREE OF PROBABLE IMPACT		
	A	B	C
2	Minor	Moderate	Major
Use	Level 1	Level 2	Level 3
Administration/Purchasing	Level 2	Level 3	Level 4
Allocate/Schedule	Level 3	Level 4	Level 5

2 A 2.0 = minor admin/purchasing

WORKING WITH AND THROUGH OTHERS NOTES FOR EVALUATORS

This factor measures responsibilities for Human Resources. When measuring the level of responsibility, consider both formal and informal requirements. Many jobs involve supervisory or managing responsibilities even if they do not have these elements officially designated. Many jobs require employees to provide training to others, or counsel employees regardless of their official titles.

Responsibility for insuring documents are correctly formatted, is COORDINATING work. Look in "downward" perspective. Overseeing another person's work.

Key requirements: YOUR TEAM / YOUR PEOPLE / ACCOUNTABILITY / RESPONSIBILITY

Accountability for Others degree definitions:

No accountability for Others: Responsibility for dealing effectively with others but no accountability for them. provides assistance

Accountable only for own training, Baseline - provides assistance

Supplier for service / information, Client for service / information

Training of others outside the TEAM is NOT for your team / your people (Training is a deliverable)

Inspections / format reviews ... is a deliverable, Reviews / monitors for technical content of non junior level position... is a deliverable

Demonstrating/Contributing: A guiding role, involves minimal control or authority. May involve showing methods to equals, or contributing to a team effort, usually informal leadership. *Contribute to team effort (I.e. on a self-directed team, contributing to interview or performance review process...)*

Train co-workers and/or backup and/or new team members for own staff or own team or coworkers

Guidance for own staff or own team or coworkers

Contribute to team effort (I.e. on a self-directed team, contributing to interview or performance review process...)

Team membership (troubleshooting team)

Reviews / monitors work for students... non full time staff

Leading: Reviews / monitors work for junior level position. Monitor process to improve systems for your team / your people.

Monitor process to improve systems for your team / your people

Setting the standards

Follow up on training for improvement

Team Leader - Leading teams with accountability for the outcome.

Supervising (Term): Supervising sub-contractors where you are accountable for outcome / deliverables. Delegates work assignments and accountable for the work produced. May be part of the hiring process for those supervised

Supervising sub-contractors where you are accountable for outcome / deliverables

Delegates work assignments and accountable for the work produced

Part of the hiring process for those you supervise

Conduct / responsible for performance reviews

Supervising (Continuing): Direct supervision of Continuing Employees including work allocation, hiring and performance reviews (full time, part time).

Note this factor includes the management of "Contractors".

**WORKING WITH AND THROUGH OTHERS
FACTOR GRID**

This factor values responsibility for human resources that may be informal or formally required and any and all aspects that add to the responsibility requirements.

ACCOUNTABILITY FOR OTHERS				
No Accountability for Others	Demonstrating/ Contributing	Leading	Supervising (Term)	Supervising (Continuing)
Level 1	Level 2	Level 3	Level 4	Level 5

RESPONSIBILITY FOR FOSTERING RELATIONSHIPS NOTES FOR EVALUATORS

This factor measures the responsibility for fostering relationships with people to the benefit of AECL. Relationships with all types of people are considered (except those already captured in Working With and Through Others. Where more than one rating fits a particular job, choose the relationship and nature of interaction that is most integral to the job.

Note: Fostering - relationships outside your group - do not confuse with Deliverables and Working with and Through Others within your own group or team - it can be a deliverable, such as the library services,

Base Level - The contact with colleagues is important and expected of everyone as a base level.

Nature of Interactions refers to the type of interactions that are required in the work. Consider the type of interaction that best describes the typical type for the job.

Nature of Interactions degree definitions:

Sharing/Explaining (Giving and Taking Dynamic): Both parties want to share information or be involved in the interaction. It usually involves an employee being able to offer or provide something that is desirable to the other party.

Advising/Persuading/Influencing (One-way Dynamic): Job requires interaction with others in order to assist in the resolution of problems by providing advice. May involve discussion of the options and recommendation of the preferred choice. Required to provide controversial information in a careful and controlled manner to minimize misunderstandings and undesired reactions.

Negotiating/Selling (Two-way Dynamic): Required to communicate the benefits of a particular course of action, respond to counter-arguments, and arrive at a winning solution. The purpose of the interaction is to get the other to act in a certain way or to develop a new solution when there is resistance. One or both parties have a reason for resisting or rejecting the interaction. Involves an exchange of cooperation, money or information in circumstances where there are competing interests. Asserting one's viewpoint in a way that results in acceptance, agreement or behaviour change, influencing individuals in the absence of direct authority.

Probable Impact considers those involved in the relationship and the probable impact of the type of relationships.

Probable Impact Degree Definitions:

Limited: Positive relationships support goodwill for AECL or enhance the efficiency and effectiveness of internal operations.

Moderate: Positive relationships enhance trust for the delivery of safe and effective service and may support delivery of service.

Substantial: Positive relationships enhance business reputation and confidence in AECL or may result in increased revenue/(decreased costs).

RESPONSIBILITY FOR FOSTERING RELATIONSHIPS

FACTOR GRID

NATURE OF INTERACTION	PROBABLE IMPACT		
Base: Level 1 No requirement for fostering relationships	Limited	Moderate	Substantial
Sharing/Explaining	Level 2	Level 3	Level 4
Advising/Persuading/Influencing	Level 3	Level 4	Level 5
Negotiating/Selling	Level 4	Level 5	Level 6

RESPONSIBILITY FOR CO-ORDINATION NOTES FOR EVALUATORS

This factor is specifically called co-ordination rather than management and it is expected to be used in a non-hierarchical manner. Many jobs have informal or formal responsibility for co-ordinating elements even though they are not given the role or title for managing it. The issues that arise in this factor often refer to the informal organizational structure. This means that employees will often not have had these roles acknowledged in the past. The important consideration at this point is whether or not they are expected and required to fulfil the co-ordinating role and in what manner.

Base Level - No Co-ordination Responsibility

Nature of Accountability considers the nature of the responsibility with regard to the co-ordination required. Responsibilities can range from sorting the materials to expediting the event, meeting etc.

Nature of Accountability degree definitions:

Preparation/Assembly/Sorting/Compiling: The jobs that ensure the materials are in their proper order, in the right location and in the right number to facilitate the next step in the process.

Monitor/Troubleshoot: The jobs that track down or follow-up on misplaced, lost or missed elements.

Expedite/Logistics: The jobs that make it happen, these are the jobs that make the arrangements, phone calls, place the orders. These jobs have the accountability for the target being co-ordinated.

Complexity of Target/Objective considers the nature of the target/objective. The target/objective could be a conference, meeting, inspection, month-end/production processes or anything else that requires some sort of co-ordination activities. Complexity aspects include the # of people involved in an event etc, # of elements, degree of precedence or lack thereof, # of options, competing agendas etc.

Complexity of Target/Objective:

Limited: Tends to be limited # of people, elements, options and there tends to be precedence.

Moderate: Tends to be higher numbers and may include some alternatives/choices/options/competing interests and there may not be any precedence to guide co-ordination.

Extensive: Tends to be high numbers; multiple alternatives, choices, options; or competing interests and there tends not to be any precedence to guide co-ordination.

**RESPONSIBILITY FOR CO-ORDINATION
FACTOR GRID**

This factor measures the responsibility for co-ordinating everything other than subordinates which will be covered under a separate factor. This factor looks at elements such as: the co-ordination of information, material, processes, projects and everything else that contributes to the flow required to accomplish the organizational obligations and requirements. The two variables to be measured in this factor are the nature of accountability and complexity of the target/objective.

NATURE OF ACCOUNTABILITY	COMPLEXITY OF TARGET/OBJECTIVE		
Base: Level 1 No Co-ordination Responsibility	Limited	Moderate	Extensive
Preparation/Assembly /Sorting/Compiling	Level 2	Level 3	Level 4
Monitor/Troubleshoot	Level 3	Level 4	Level 5
Expedite/Logistics	Level 4	Level 5	Level 6

WORKING CONDITIONS FACTORS:

**PHYSICAL AND PSYCHOLOGICAL ENVIRONMENT/HAZARDS
NOTES FOR EVALUATORS**

This factor measures the relative disagreeableness/hazards of physical and psychological elements **inherent** in the work environment that may or may not be visible but have definite effects. This factor ignores individual preferences and tolerance levels. There are elements that are known to be negative and detrimental regardless of personality differences.

Base Level - Slightly Disagreeable: Minor irritants or inconveniences

Degree of Severity measures the severity of the elements in the working conditions of the job, which are physically or psychologically negative or hazardous.

Degree of Severity degree definitions:

Moderately Disagreeable: Bothersome conditions, which are disconcerting

Very Disagreeable: Disturbing conditions that require work aides but a high level of discomfort usually still remains.

Risky: Job is exposed to hazards, which could result in moderate injury

Stressful: Conditions weigh heavily on employees and are inescapable.

Hazardous: Job is exposed to hazards, which could result in severe injury or death.

Frequency measures the incidence of probable exposure to the negative physical or psychological conditions or hazards. Percentage of time of exposure is an indicator of frequency.

Frequency degree definitions:

Occasionally: Less than 40% of the time and there are breaks between occurrences

Usually: More than 40% of the time and may be a constant state or minimal time between occurrences

The following is a **sample** list of disagreeable psychological conditions that might be found in the work environment or conditions of jobs.

- | | |
|--|---|
| Disagreeable, abusive interactions with people | Monotony |
| Distractions and interruptions | Potential threat to personal security |
| Isolation from co-workers | Small work space |
| Knowledge that decisions will affect lives | Unpredictability of work |
| Lack of privacy | Burden of responsibility to protect confidentiality |

PHYSICAL AND PSYCHOLOGICAL ENVIRONMENT/HAZARDS

FACTOR GRID

This factor measures the degree to which a job's physical or psychological working environment is disagreeable or possibly hazardous to one's physical or psychological health. The two variables that this factor considers are the degree to which the elements of the working environment are disagreeable or hazardous and the frequency of exposure to them.

FREQUENCY		DEGREE OF SEVERITY		
	Base: Level 1 Slightly Disagreeable	Moderately Disagreeable	Very Disagreeable or Risky/Stressful	Hazardous
Occasionally		Level 2	Level 3	Level 4
Usually		Level 3	Level 4	Level 5

APPENDIX G: JOINT CLASSIFICATION STUDY WEIGHTING SCENARIO

Weighting Scenario 3

Weights

	Levels				
	1	2	3	4	5
Weights					
Skill					
16% Knowledge	16	52	88	124	160
10% Communication Skill	10	33	55	78	100
3% Physical Skill	3	12	21	30	
Effort					
5% Versatility/Multi-tasking	5	16	28	39	50
5% Work Challenges	5	16	28	39	50
3% Physiological Effort	3	10	17	23	30
Responsibility					
20% Deliverables	20	65	110	155	200
10% Resources	10	33	55	78	100
10% Working With and Through Others	10	33	55	78	100
10% Fostering Relationships	10	40	70	100	
5% Co-ordination	5	16	28	39	50
Working Conditions					
3% Physical and Psychological Environment/Hazards	3	10	17	23	30
100% Total Weight					

11/27/2001

APPENDIX H: JOINT CLASSIFICATION STUDY IMPLEMENTATION LETTER

PROTECTED EMPLOYEE INFORMATION

Date: 2002-15-21

To: NAME

EN: ID

From: MANAGER

Re: Job Classification Review M/CM 6-11

The results of the Classification review are complete. This result took into account the following information: Questionnaire results (if applicable), Generic Level Descriptors, and a Management Review. Our records indicate you have had a job change(s) during the period of the review and this is reflected in the results for your position(s) as follows:

Position Title:
Classification 2000/01: M/CM XX

Reviewed Classification: M/CM XX

Current Position Title:
Current Classification: M/CM XX

Reviewed Classification: M/CM XX

If the above indicates an upgrade, details of your salary changes will be communicated in a follow up letter.

General information regarding the Job Classification Review is available in the Frequently Asked Questions (FAQ's) on the following website. Information on the Appeal Process is also available.

http://intranet/hr_aecl/Collection/COMPENSATION&BENEFITS/

Thank you for your patience.

CC: HRA MERGE

APPENDIX I: O.P.E.I.U. LOCAL 404 COMPLAINT WITH THE CHRC, 2002 MAY 13

Complaint of Office and Professional Employees International Union, Local 404

Respondent: Atomic Energy of Canada Limited,

Respondent's Address: Chalk River, Ontario K0J 1J0

Date of Alleged Conduct: November 1999 to the present and continuing

Location of Incident: Chalk River, Ontario

ALLEGATION

Atomic Energy of Canada Ltd. has discriminated and continues to discriminate against its female employees by establishing and pursuing policies and practices in the implementation of the Pay Equity Job Classification Study that reintroduces gender bias in its wage structures, and that otherwise deprive female employees of employment opportunities on the grounds of sex, contrary to s. 10(a) of the *Canadian Human Rights Act*.

PARTICULARS

1. Office and Professional Employees International Union, Local 404 ("Local 404" or "the Union") represents employees at the Chalk River Laboratories plant of Atomic Energy of Canada Ltd. ("Atomic Energy" or "Management"). Local 404 employees are predominantly women who fill administrative and clerical positions.
2. On November 26, 1999, Local 404 and Atomic Energy signed Minutes of Settlement (the "Settlement") after a June 1999 Pay Equity Study was completed in fulfillment of Minutes of Settlement signed by the parties in 1997, which in turn was precipitated by a pay equity complaint to the Canadian Human Rights Commission in 1994. The 1999 Settlement recognized a wage gap identified by the Pay Equity Study and the need for pay equity adjustments and backpay.
3. One of the problems highlighted by the Pay Equity Study was the existence of inequities among female-dominated Local 404 jobs. Therefore, the parties also agreed in the Settlement to include provision for a company-wide Job Classification Study (the "Study") beginning with the CM6-CM11 and M6-M11 pay ranges or classification levels aimed at correcting those internal inequities. The Study was broad enough in scope to reclassify all unionized and non-unionized clerical and administrative jobs at Atomic Energy, including male-dominated trade and technical jobs at the Sheridan Park plant contained within the M6-M11 pay ranges.
4. A joint Steering Committee with representatives from unionized and non-unionized employees at Chalk River Laboratories and Sheridan Park was struck to implement the

Study, as well as with a management-provided process consultant, and as agreed, methodologies from the June 1999 Pay Equity Study were adopted for this purpose.

5. Under the Settlement, Atomic Energy was to cover the cost of the Study. The Union depended on Management to allocate enough resources to distribute and gather questionnaires from all employees in a unified manner, and to gather any other personnel data under its control. The information gathered from employee questionnaires was to be weighted by evaluation teams struck by the Steering Committee in order to generate an overall score representing the comparative value of each employee's position. The integrity of the scores depended on the implementation of a unified plan covering all positions, and accurate and timely data-gathering.
6. During the preparation and planning phase of the Study, the Union, non-union and Management representatives on the Steering Committee were actively involved in the process. However, during the data-gathering and evaluation phases, Management began taking unilateral action without the consent of the Steering Committee, which is resulting in reintroducing pay inequities in the workplace, as will be described below.
7. Concerns began to emerge when the Human Resources department of Atomic Energy ("Human Resources") decided to extend the deadline for employee questionnaires, which resulted in the elimination of the screening of the questionnaires. The screening phase was intended to ensure that all parts of the questionnaire were completed and that employees properly understood the questions. This step was essential in order to ensure the accuracy of the information. Without this step, the weighting of data and the generated score for each position would likely create inaccurate results. Human Resources informed Local 404 that this step would take too long to complete due to a lack of resources and a lack of commitment to the Study on the part of Atomic Energy. The decision not to screen employee questionnaires was made by Human Resources without the consent of the rest of the Steering Committee.
8. Steering Committee members became concerned that managers were not supportive of the Study after there were repeated delays in the submission of evaluations from managers. Union and non-union committee members asked Human Resources what would happen if management did not support the results of the study. Human Resources claimed that they could not require managers to accept the official results of the Study, and that further, Human Resources was prepared to re-evaluate re-classification results to obtain manager agreement. Steering Committee members were told that budgets would be the determining factor in the end, and managers could determine whether they could afford to pay for upgraded positions.
9. There began to be other evidence that Atomic Energy was not committing the resources needed to collect all the information needed to complete the Study in a timely manner. The Study began to run behind schedule. Local 404 agreed to sign an agreement with Atomic Energy extending the time limit for the completion of the Study by six months -- from March 31 to October 1, 2001 -- with the proviso that there would be no further delays.

10. During this time, Human Resources unilaterally removed the technical and trade representatives from the Steering Committee, as it preferred to work with them separately. The resulting lack of uniformity contributed to a further skewing of the results.
11. The Steering Committee was responsible for redesigning job profiles based on the information gathered from the employee questionnaires. The Union continuously expressed concern that the information being generated was reintroducing gender bias that the Pay Equity Study was produced to eliminate. The reasons for this concern were:
 - a. Management was using generic descriptors already in existence;
 - b. The technical and trade positions at Sheridan Park were not represented at the Steering Committee, and were working on their profiles independently, thus making a unified approach impossible;
 - c. Management wanted to collapse 6 job ranges into 5, which broadbanded some positions together and underestimated the job levels of some of the administrative positions; and
 - d. Trade and technical jobs were moved into the top 2 levels despite lower scores than the clerical administrative jobs in the CM and M ranges.
12. This job matrix, which was favoured by Management and which was not approved by the Steering Committee, had the effect of reintroducing gender bias that the Pay Equity Study had eliminated. For example, it produced a wide gap between CM10-11 (level 5) and M12 positions, which had implications for career and skill development, as well as layoff rights under the collective agreement for some Local 404 jobs. The fact that the male comparator group was not re-evaluated contributed to the gender bias in these results. Further, as time delays accumulated, the job evaluations began to be out-dated.
13. More problems emerged when in the summer of 2001, Human Resources asked managers to review a draft copy of the results to date, with the understanding that the information should be kept confidential until it was finalized, in order to provide input to the Steering Committee. After reviewing the preliminary results, one of the managers informed two of her employees that their positions would be downgraded as a result of the Study. In fact, the Settlement had provided for the red circling of those positions that might be downgraded as a result of the Study. The employees were upset and the Local 404 membership became irate. The Union in turn expressed its concerns to Human Resources that the integrity of the process and the accuracy of the results would be damaged if employees were given information before it was finalized.
14. The Union became increasingly concerned that the problems in the process were accumulating to an unacceptable degree, and that these problems were not being addressed to the satisfaction of the Union or the Steering Committee. The results of the Study were being skewed, gender bias was being reintroduced, and Human Resources

was making unilateral decisions resulting in artificially inflated scores for male trade and technical positions. Joint meetings had ceased by June 2001, and Management ceased providing updates to Local 404 on the progress of the Study.

15. On October 1, 2001, the timeline to complete the Study again expired due to lack of Management resources committed to the Study, and a breakdown in cooperation. The Union decided to withdraw from the process based on its evaluation that the Steering Committee was being used to legitimize the unilateral decisions of Human Resources, that the Study was reproducing gender bias, and that it would erode access to career development and otherwise violate the rights of Local 404 employees under their collective agreement.
16. In the agreement to postpone the deadline of the Study, the parties had agreed to maintain stability of job classifications and to postpone all requests for job upgradings until the completion of the Study. After its withdrawal from the Study, Local 404 then asked Human Resources to evaluate a position that had been upgraded before the Pay Equity Settlement was signed in November 1999, as well as some positions that required upgrading since that time. Human Resources refused, saying that it did not have the resources to evaluate it, and that in any case all jobs were frozen until the Study was completed. This was despite the fact that new jobs were being evaluated and posted on a regular basis, and that the Study should not be completed following the withdrawal of the Union.
17. Despite the withdrawal of the Union, Management continues to the date of filing this complaint to implement job reclassifications. Although Management provides updates on the process of the Study, the Union is not consulted nor does it have a forum to provide meaningful input. In contrast, senior managers have been given the opportunity to provide input on job reclassifications. It is unclear what methodology is now being utilized. There is evidence to suggest that the results of the Study are being "dispositioned" in favour of job reclassifications preferred by senior managers, and that market studies may be used to justify their eventual decisions. Market studies would certainly reintroduce gender inequities and reverse any progress attained in the past.
18. In any case, it is clear that the original methodology of the Study required the full participation of all representatives on the Steering Committee, including the Union representatives. Management in effect abandoned the original methodology of the Study when it ignored decisions arising from the Steering Committee and took unilateral action separate and apart from the Steering Committee.
19. In conclusion, it is alleged that 10(a) of the *Canadian Human Rights Act* is violated because of the negative impact on women in female-dominated jobs at Atomic Energy that has resulted and will likely result from Management's disregard for the agreed-to methodology of the Pay Equity Job Classification Study under the terms of the 1999 Settlement. Atomic Energy has abandoned the Study methodology by not allocating sufficient resources, by introducing delays in data-gathering, by not requiring implementation by managers, and by not abiding by the decisions and process determined

by the joint Steering Committee. These actions have had and will likely have in the future a disproportionate impact on female-dominated job classes as opposed to their male-dominated counterparts with respect to promotion, wage scales and other rights based on job classification under the collective agreement. Further, faulty job reclassifications will reintroduce pay inequities that discriminate on the basis of sex that will ultimately lead to violations of s. 11 of the *Canadian Human Rights Act*.