



REGIONAL MUNICIPALITY
OF **WOOD BUFFALO**

TERMS OF REFERENCE

JOINT JOB EVALUATION PROJECT

For CUPE 1505, Municipal Employee Jobs

June 12, 2017

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INTRODUCTION


The Regional Municipality of Wood Buffalo (the Employer) endorsed a Collective Agreement with the Canadian Union of Public Employees, Local 1505 on May 07, 2014 which included provisions under Article 27.04 where "the Joint Evaluation Committee will carry out an evaluation of bargaining unit positions".

This document has been prepared collectively by the Employer and CUPE 1505 as a Terms of Reference containing general objectives, principles, and guidelines to carry out the Joint Job Evaluation Project of CUPE Municipal Employee bargaining unit jobs.

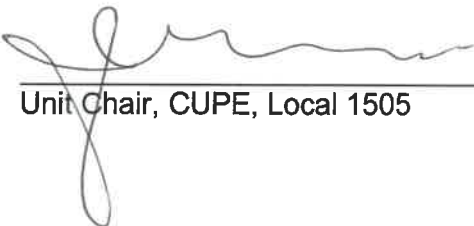
The Terms of Reference will be used for evaluation and the creation of a new Classification Schedule. Implementation will be negotiated at a later date. The current job evaluation tool in place will be utilized until the project is completed. Maintenance shall be excluded from this project and addressed through collective bargaining.

Effective Date: June 13/17

Signatures: 
Director, Human Resources
Regional Municipality of Wood Buffalo


Manager, Compensation, Benefits and Payroll
Regional Municipality of Wood Buffalo


President, CUPE, Local 1505


Unit Chair, CUPE, Local 1505

ARTICLE 1 – PURPOSE

- 1.1 To carry out a Neutral Joint Job Evaluation Project in accordance with the general objectives and principles set out in this Terms of Reference.
- 1.2 To jointly implement a Job Evaluation Plan to achieve internal pay equity for all jobs within the CUPE Local 1505 Municipal Employee Collective Agreement. The plan will include these four main factors:
- Skill
 - Effort
 - Responsibility
 - Working conditions
- 1.3 The parties will maintain accurate job information and job ratings on an ongoing basis. Failure to do so will serve to damage the integrity of the program. The parties shall have access to a joint database for this purpose.

ARTICLE 2 - DEFINITIONS

The following definitions are to apply to the terms used herein and throughout the Job Evaluation Project:

Classification Schedule	A listing of all unionized municipal jobs that are included in the CUPE Local 1505 Municipal bargaining unit. The listing includes each job's title, job number, and classified pay level based on the results of the job evaluation process.
Collective Agreement	The collective agreement in effect between the Employer and CUPE Local 1505 for the period 2014 – 2017 inclusive.
Conflict of Interest	Where the independence or impartiality of an employee's decisions or actions are impaired or may reasonably be expected or perceived to be impaired because of outside employment, political, business or family interests or because of the position that they hold with the Employer.
Degree Level	The actual measurement level with each sub factor.
Duties	Is made up of a number of tasks as described in the job description.
Factors	The four factors used to measure jobs are skill, effort, responsibility and working conditions. There are further sub-factors within each factor that are rated.

Incumbent	An employee assigned to a job.
Job	Is made up of a collection of tasks, duties and responsibilities as described in the job description.
Job Analysis	The process of determining and recording the tasks and duties of a job and the required skill, effort, responsibility and working conditions involved in the performance of that job, through the use of questionnaires, resources and interviews with incumbents and supervisors.
Job Description	The written description of a job which includes a summary and a listing of the major responsibilities, qualifications (i.e., education and experience) and other requirements.
Job Evaluation	A process which measures the value of jobs in relation to the set factors in the Job Evaluation Tool, this value is expressed in points.
Job Evaluation Tool	A measuring tool used to rate jobs. It contains sub-factor definitions with corresponding degree levels and notes to raters.
Job Information Questionnaire (JIQ)	A tool used to collect and record information about a job as a means to provide supplementary job information and further support the approved job description. The JIQ is completed by the employee job holder(s) and validated by their direct exempt supervisor. It is used in job evaluation and in the development and revision of job descriptions to ensure all pertinent information is captured.
Pay Level (PL)	The code assigned to a job that represents the common level a job has been assigned. Each Pay Level is reflective of a range of Total Points. Jobs with Total Points within the same prescribed range are classified in the same Pay Level and are assigned the same wage rate. This Pay Level is shown on each job description and is maintained in the Classification Schedule.
Points	The numerical expression assigned to each degree level within each sub-factor.
Rating	The process of relating the facts contained in the job documents to the Job Evaluation Tool and selecting the factor degree levels judged to be appropriate.
Rating Sheet	Records the facts and rationale for the degree levels assigned to each sub-factor for each job.

Schedule of Wages	A table or grid that shows the wage rates applicable for each Pay Level. The wage rates are negotiated through collective bargaining. The current Schedule of Wages can be found in Appendix A, page 70 of the Collective Agreement.
Sore-Thumbing	The process of making an objective comparison of a rating decision to previous rating decisions of similar and/or related positions. Comparison may be performed by sub-factors or total points. This is not a substitute for the application of the Job Evaluation Tool, but rather to ensure consistency in job evaluation.
Sub-Factors	Are components of the four major factors.
Task	A unit of work activity which forms part of a duty; one of the operations that constitute a logical and necessary step in the performance of a duty.
Total Points	The sum of all points allocated to each job for all sub-factors determined in accordance with the Job Evaluation Tool.

ARTICLE 3 - MANDATE OF THE STEERING COMMITTEE

- 3.1 The Steering Committee shall be comprised of two (2) representatives each from the local Union and the Employer, and may be assisted by their nominated resources. These members may be substituted for by alternates, or added to, by mutual agreement.
- 3.2 All decisions shall require unanimous agreement. If the Steering Committee is unable to reach unanimous agreement relating to the development of the project and rating tool, each party may designate a subject matter expert (i.e., external compensation consultant, and national CUPE representative) to meet with the committee and assist in reaching a decision. Where there is failure to reach an agreement, the matter will be brought to the Director, Human Resources for consultation. If there is no agreement after consultation with the Director the matter will be brought to negotiations.
- 3.3 The Steering Committee shall coordinate the Job Evaluation Project by:
 - a) Establishing timeframes and priorities for completion of work, and managing these timeframes and priorities on an as required basis;
 - b) Ensuring the integrity of the program and that all related communications are prepared and issued jointly;
 - c) Ensuring that all Rating Review Committee members are appropriately trained in job evaluation;

- d) Selecting a representative cross section of jobs to be rated by the Rating Review Committee, to form a benchmark of application for the Job Evaluation Tool, for use by the Consultant;
- e) Providing interpretation of and approving amendments to the Job Evaluation Tool and Job Information Questionnaire (JIQ) as required; reviewing weightings to the factors; and agreeing upon the JIQ template, terms of reference, and reconsideration form;
- f) Settling of Rating Review Committee disagreements;
- g) Reviewing banding options for pay levels as proposed by the Consultant/Compensation team and selecting an option to be used to form the new Classification Schedule; and,
- h) Submitting the drafted new Proposed Classification Schedule to the Employer and the Union Executives, which will be subject to agreement by both parties before implementation.

ARTICLE 4 – MANDATE OF THE RATING REVIEW COMMITTEE

- 4.1 The Rating Review Committee shall have equal representation and participation, consisting of two (2) regular representatives from the Employer and two (2) regular representatives from the local Union; which shall constitute quorum.
- 4.2 Each party shall appoint two (2) alternate representatives to serve as a replacement for an absent regular member. Alternate members shall have the right to vote only when replacing a regular committee member who is absent or unable to attend, or excused due to a conflict of interest. To maintain consistency and the integrity of the project, only one (1) alternate from the Employer and one (1) alternate from the Union may be present for the evaluation(s).
- 4.3 The Employer will provide administrative support services to the Rating Review Committee. These services shall be under the direction of Human Resources and shall include:
 - a) Scheduling meetings;
 - b) Distribution of all committee correspondence; and,
 - c) Preparation and distribution of committee documents and rating forms, and collection and filing of these documents.
- 4.4 It is agreed by the Union and the Employer that a mutually agreed upon consultant will be utilized to evaluate jobs during this project and sore-thumbing will be performed in collaboration with the Rating Review Committee. To ensure rating consistency and calibration between the Rating Review Committee and the Consultant, joint job evaluation training and benchmarking will be completed.

4.5 The Rating Review Committee shall apply the Job Evaluation Tool by:

- a) Evaluating a representative sample of CUPE jobs to establish benchmarks and rating consistency when using the Job Evaluation Tool;
- b) Maintaining the integrity of the project;
- c) Recommending to the Steering Committee, changes to the Job Evaluation Tool, the JIQ, procedures or methods, as may be deemed necessary from time to time;
- d) Reviewing job ratings by the Consultant and performing sore thumbing exercises; and,
- e) Informing the Steering Committee when they are satisfied with the job ratings and that they are in agreement with moving forward with the next step of the Job Evaluation Project (banding options proposed by the Compensation Team).

ARTICLE 5 – MANDATE OF THE CONSULTANT

5.1 The Consultant will:

- a) Propose to the Steering Committee a point assignment for each of the sub-factors, and submit these with the methodology used to assign the points;
- b) Train the Rating Review Committee and participate in the benchmarking exercise to establish consistency between the Rating Review Committee and the Consultant;
- c) Use the benchmarked ratings of the Rating Review Committee as a guide to rate each job using the Job Evaluation Tool;
- d) Use the online Rating Tool System to record ratings and detailed rationales and deliver a comprehensive rating of each job to the Rating Review Committee;
- e) Perform sore-thumbings with the Rating Review Committee; and,
- f) Show the total point rating for each job in the rating summary.

ARTICLE 6 – JOB EVALUATION PROJECT STEPS

6.1 This section outlines the steps to be followed to complete the overall job evaluation project. Appendix A provides a project flow diagram for these steps.

Step 1

Rating Review Committee members will be trained in job evaluation by the Consultant. This will include evaluating a representative sample of CUPE jobs to establish benchmarks and rating consistency when using the Job Evaluation Tool.

Step 2

A JIQ shall be completed by the position incumbent(s) and reviewed by the direct exempt supervisor. The completed questionnaire shall be submitted to Human Resources or via the online Rating Tool System.

Step 3

Jobs shall be rated by the Consultant based on the JIQ and the job description, in accordance with the Job Evaluation Tool.

The Consultant will record the results and detailed rationale in the shared Rating Tool System.

Step 4

Once all the job ratings have been completed, a sore-thumbing exercise will be undertaken by the Rating Review Committee. Sore-thumbing may be performed on a department, work area, or job family basis. Sore-thumbing will be done by consensus decision of the Rating Review Committee and may result in a job going back to the Consultant for further review using the Job Evaluation Tool. To protect the integrity of the job evaluation process, agreed upon changes will be made by the Consultant in the online Rating Tool System.

Step 5

Once all jobs have been reviewed and sore-thumbed by the Rating Review Committee, the Committee will communicate to the Steering Committee that they are in agreement with moving forward with the next step of the Job Evaluation Project (Step 6).

Step 6

The Compensation Team will prepare banding options for classification of jobs into pay levels. This will involve using statistical methodologies to provide options for total point ranges (also referred to as banding). Jobs with total point scores within the same range will be banded together and given the same pay level classification. This step will also include costing for each identified option.

Step 7

The banding options, with cost analysis, will be presented to the Steering Committee. The materials presented to the Steering Committee will not display total points, as this has already been thoroughly reviewed by the Rating Review Committee. Instead the review will focus on banding, however, the Steering Committee may request rationales for any jobs it views as an outlier to a pay level classification.

The Steering Committee will review the banding options to select an option for presentation to the CUPE Executive, HR Director and the Chief Administrative Officer.

If this cannot be agreed to, the decision will be deferred to collective bargaining for negotiation and decision.

Step 8

CUPE Executive, HR Director and the Chief Administrative Officer will be presented with the selected banding option. If supported, this will form the new Proposed Classification Schedule.

Step 9

The new Proposed Classification Schedule will be communicated to CUPE employees jointly by CUPE Executive and the Employer. This will also start the 30 day Reconsideration Period.

Step 10

The Rating Review Committee will perform the Reconsideration Process for requests where it was deemed appropriate to complete a re-evaluation due to new information provided. An additional 15 days after the 30 day Reconsideration Period will be utilized to complete this process (45 days total). See Article 10 for further details.

Step 11

The Steering Committee finalizes the Proposed Classification Schedule and prepares recommendations for implementation.

Step 12

The Steering Committee presents the final Proposed Classification Schedule and implementation recommendations to the Employer and Union Executive. This will end the project and Article 27.04 a) will be satisfied. Implementation will be subject to agreement between both parties. See Article 11: Implementation for details.

ARTICLE 7 – JOB EVALUATION AND BENCHMARKING GUIDELINES

- 7.1 The below general guidelines will be followed when the Consultant evaluates jobs and when the Rating Review Committee performs the initial benchmarking exercise.
- a) Job rating decisions during benchmarking shall require a consensus decision of the regular Rating Review Committee members. Alternate members will be required to observe job evaluation but will not be able to vote. If a consensus rating decision cannot be achieved, the matter shall be referred to the Steering Committee for a decision.
 - b) Jobs are placed at the appropriate degree level in each sub factor by comparing the specific requirements of the job to the sub factor definition and the description of each degree level.
 - c) Criteria will be scored based on the minimum qualifications of the job description.

- d) It is the content of the job, and not the performance of the incumbent(s) that is being rated.
- e) Jobs are evaluated without regard for existing wage rates.
- f) Where the JIQ and/or the job description are considered vague or ambiguous in respect of a factor or sub factor, the Rating Review Committee (for benchmarks) or Consultant may consult resources or the supervisor to clarify any questionable items and record the information gleaned.
- f) No interpolation of sub factor degrees (i.e. mid-points) is permitted.
- g) Rating results and rationales will be recorded in the shared Rating Tool System before the adjournment of each meeting. System access to documented job evaluation results and rationales will be securely managed by the Compensation Team. Access to view documentation will be provided to the Rating Review Committee members for reference purposes. No other parties shall be allowed access to the information nor will the Rating Review Committee members be permitted to share ratings or rationales to other parties. There is an exception for Steering Committee members who will be able to request banding rationales for specific jobs however they will not be privy to individual rating results.

ARTICLE 8 – RATING REVIEW GUIDELINES

- 8.1 The below general rules and guidelines will be followed when the Rating Review Committee completes its score thumbing exercises.
- a) The Rating Review Committee shall meet as necessary at a mutually agreed upon time and place.
 - b) Each member shall receive notice along with the documents required to support scheduled meeting at least 48 hours prior. The administrative support may call a meeting by giving written notice and this meeting shall take place within seven (7) working days of the delivery of the notice to the Rating Review Committee.
 - c) Rating Review Committee members will not review or rate their own job, any position of a direct subordinate, or any position where the rating of that job may place them in a conflict of interest situation.
 - d) Either party to the Project may engage resources to assist its representatives on the Rating Review Committee. Any such resource shall be entitled to voice but not to vote and shall not be considered to be a member of the committee. Guests to the meeting shall speak at the beginning of the session and will be excused prior to the rating review.
 - e) The Rating Review Committee will have shared access to the Rating Tool System and will be able to view all rating results and rationales. They will not have the ability to change any rating results and rationales in the Rating Tool System

during the project. This will be performed by the Consultant/Compensation Team only based on the direction provided by the Rating Review Committee.

ARTICLE 9 – SETTLEMENT OF RATING DISAGREEMENTS

9.1 In the event the Rating Review Committee is unable to reach consensus agreement on any matter relating to a job rating, the committee must resolve the matter within ten (10) working days. To help resolve the disagreement, each party may identify resources to assist in reaching a decision during the ten (10) working day period (i.e., external compensation consultant, national CUPE representative, the job's direct supervisor).

If the matter is not resolved within this time period, it shall be sent to the Steering Committee for resolution.

9.2 The time limits contained in this Article may be extended by mutual agreement of the Steering Committee.

ARTICLE 10 – EMPLOYEE RECONSIDERATION PROCESS

10.1 The Proposed Classification Schedule will be jointly communicated to employees in CUPE 1505 Municipal Employee bargaining unit positions once the CUPE Executive, HR Director and the CAO have provided their support (Article 6, Steps 8 and 9). Once communicated, there will be a 30 calendar day Reconsideration Period. During this time, an incumbent may request a reconsideration.

10.2 To request a reconsideration the employee must complete the Job Evaluation Reconsideration Form as shown in Appendix B. The employee will be required to provide a reason, rationale and any new information to support the reconsideration request. Once completed, the employee's exempt supervisor will sign the form and may, if she/he wishes, attach comments regarding the information provided.

10.3 Job re-evaluations will only be performed when it has been deemed appropriate by the Rating Review Committee that there is new information provided to support a re-evaluation.

10.4 A review by the Rating Review Committee will be undertaken within 45 calendar days from the start of the Reconsideration Period (date Proposed Classification Schedule released to CUPE employees). The Rating Review Committee will record the decision of the review on the Job Evaluation Reconsideration Form shown in Appendix B.

10.5 Disagreements will be addressed as noted in Article 9.

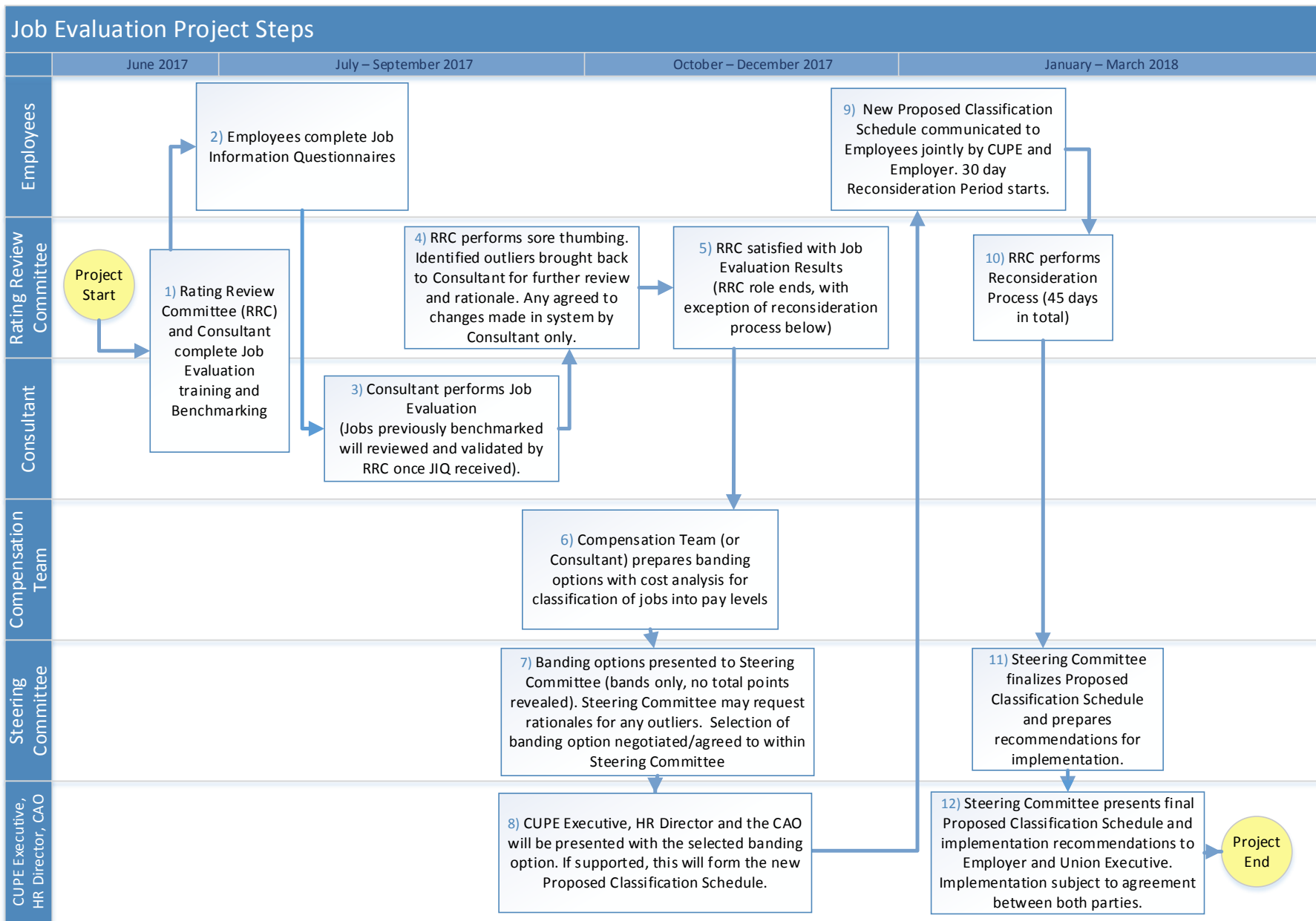
10.6 At the end of the Reconsideration Period, all reconsideration requests will be addressed through the process noted in the Collective Agreement as per Article 27.04 b).

10.7 New or amended jobs after the end of the Project will follow the general procedure for rating jobs or as otherwise described in the Collective Agreement, as amended from time to time.

ARTICLE 11 - IMPLEMENTATION

11.1 The Steering Committee will recommend an implementation process to the Employer and CUPE Executive for approval.

Implementation is expected to be cost neutral and is subject to budget considerations. Therefore, implementation of pay level adjustments may utilize methods such as notice periods and phased wage changes.



JOB EVALUATION RECONSIDERATION FORM

To request a reconsideration of a job's evaluation results please complete this form and have it signed by the job's direct exempt supervisor. The period to request a reconsideration is from [Date] to [Date]. Any requests outside of this period will be addressed as per Article 27.04 of the Collective Agreement. Please be aware that the results of a reconsideration request may cause a job's pay level to increase or decrease.

Job Title:	Job Description #:
Department(s):	Location(s):
Number of employees in job:	
Explanation of reason for reconsideration request (attach an additional page if required and provide reasons, rationale and any new information for why you think the job evaluation results should be reconsidered):	
Request initiated by (names) :	
Signature(s):	Date:

Exempt Supervisor Signature:	Date:
Exempt Supervisor Comments (optional):	

Please send request to Compensation@RMWB.ca and Admin@CUPE1505.ca

JOB EVALUATION DECISION RESULTS

Internal Use: To be completed by Rating Review Committee

Date Reconsideration Received:	Decision Date:
RATING RESULTS: <input type="checkbox"/> No Change <input type="checkbox"/> Change Pay Level:	
Rating Review Committee Comments:	
Rating Review Committee Members:	
Human Resources to send copies to: <input type="checkbox"/> Employee(s) <input type="checkbox"/> Supervisor <input type="checkbox"/> Union	