THE SITUATIONAL SUITABILITY
OF JOB EVALUATION PLANS
IN UNIONIZED ENVIRONMENTS

By

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Despite the age of and scholarly interest in job evaluation, little research has been done which would assist the practitioner in determining what plan would best suit any given situation (particularly within a unionized context) and what criteria can be used to measure plan effectiveness. The focus of this study was to identify and analyze the situational factors which influence a firm's choice of job evaluation plans, and ascertain the impact these factors may have on plan effectiveness, as well as, to develop common criteria for measuring effectiveness. A sample of three British Columbia unionized organizations was examined, and the observations arising from each plan were documented in the form of a case study.

Each plan reflected historical, environmental and internal influences peculiar to the individual organization while, at the same, all had been subjected to certain common exigencies. The observations of the sample supported earlier research on the influence of various factors. For example, as noted in the literature, senior management support, the existence of an appeal mechanism and regular plan audit, as well as, full information accessibility appeared to correlate with plan effectiveness. Additionally, it was noted that the stability and competency of the analysts, as well as, the nature of the work environment were particularly influential. A growth in union interest in job evaluation was evident and the relationship between management and the union strongly dictated the degree of freedom with which management was able to apply job evaluation. However, job evaluation was perceived, by both management and labour, to be non-adversarial in nature. The traditional job evaluation process was evidently time-consuming and cumbersome; all organizations expressed a need for a more expedient process. Only one organization expressed concern regarding the issue of equal pay for work of equal value, suggesting that it is, currently, more of a philosophical than practical issue vis a vis job evaluation.
Few common criteria of job evaluation plan effectiveness were applied. Nevertheless, based on common concerns and experiences observed in the study a measurement "checklist" was compiled which outlined the following job evaluation plan requirements: (1) predetermined goals of the plan, (2) senior management support, (3) workable terms of reference, (4) evaluation method suitability, (5) evaluation method soundness, (6) evaluation consistency, (7) checks for accuracy/objectivity, (8) plan credibility and comprehensibility, (9) administrative efficiency, and (10) wage/classification structure rationality.

Insofar as labour and management share a common goal for job evaluation, the potential for increased sophistication and effectiveness of plan development and administration appears to be great.
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INTRODUCTION

Wage determination theories and practices, for many years, have expanded on the fundamental "supply and demand" principle of labour pricing, adjusting to the changing pressures in the labour market. For example, economic growth, technological change and the growth of "megacorporations" have created new occupations which defy the traditional "skilled/semi-skilled/unskilled" labour market classifications. Furthermore, the growing significance of collective bargaining has introduced more disparate variables to the labour market equilibrium. These economic forces, precipitating the need for more sophisticated tools of wage determination, have been strengthened by a growing social impetus which questions traditionally yet potentially discriminatory wage differentials. Wages remain one of the most important elements in conditions of employment; therefore, it is critical that wage structures are responsive to these ongoing economic and social changes. Equally important is employee perception of fair remuneration for their efforts and contributions. Job evaluation, a process developed over one hundred years ago to address the issue of relative wage determination, must now also address the above mentioned changes.

Rather than a single concept, job evaluation can be thought of as a generic term referring to a variety of methods determining the relative worth of jobs. The British Institute of Management defined job evaluation as:

The process of analyzing and assessing the contents of jobs in order to place them in an acceptable rank order which can then be used as a basis for remuneration. Job evaluation, therefore, is simply a technique designed to assist in the development of pay structures by defining relativities between jobs on a consistent and systematic basis. The term "job evaluation plan" is introduced in this study to refer to a specific system which embraces job evaluation methodology and the ongoing maintenance and administration of the resultant wage differentials.
The Problem

Job evaluation may be orderly and methodical, but the current methodology is not scientific; in fact, the National Academy of Sciences' Committee on Occupational Classification and Analysis, in their 1981 assessment of job evaluation systems, concluded that the current methodology is "under-developed", and unable to meet the demands of today's dynamic economic and social environments. Although there is no paucity of research and literature on job evaluation, there is a conspicuous lack of consensus regarding the superiority of any one plan in meeting these demands. A fundamental obstacle to an empirical comparison of plans is the lack of universal criteria for assessing job evaluation plans, reflecting the existence of a variety of research perspectives.

The dominant emphasis of research, to date, has been on the accuracy of job evaluation as a measurement instrument. This perspective focuses on the reliability and validity of evaluations, predictability of wage distributions, convergence between evaluation methodologies, effect of compensable factor choice, etc. Therefore, within this ideology job evaluation plan effectiveness would be measured using statistical analysis of the accuracy of evaluation decisions validated against existing wage criterion.

However, another, very different, research perspective suggests that this approach is too narrow and does not take into consideration key contextual factors. Kerr and Fisher, representing this point of view, suggest that:

The technical core of a plan (instrumentation), on which so much attention is lavished, has generally less bearing on the ultimate results than either the environment into which it is injected or the policies by which it is administered. Currently, there is growing support of this perspective, with many compensation specialists agreeing that no single plan is suitable to all circumstances. Rather, it is believed that a job evaluation plan must meet the unique circumstances, goals, and philosophies of the individual organization. Unfortunately, little research has been done which would assist the practitioner in determining what plan would best suit any given situation, particularly within
a unionized context, and what criteria can be used to measure plan effectiveness. Schwab points out these research limitations and suggests:

... the more fundamental challenge to an understanding of job evaluation rests in the institutional perspective. Job evaluation is a complex system, complexly related to a number of other personnel systems (e.g., wage surveys) in the organization. A great number of judgments are necessary to set up such systems and to maintain them over time. Until we learn much more about the exogenous factors that influence them, we run the risk of establishing policies that will not accomplish the objectives sought.

Therefore, in aid of a better understanding of the contextual influences, this present study addresses the issue of the situational suitability (thus also encompassing situational variability) of job evaluation plans within unionized settings. It is intended to be a working paper focusing on the following questions:

1. What are the salient factors being addressed by management and labour today, when establishing and maintaining a job evaluation plan?

2. How effective are various job evaluation plans in meeting the specific situational requirements?

3. What criteria can be generalized and applied to measure job evaluation plan effectiveness?

To these ends, this study will examine and compare a sampling of job evaluation plans in use in a variety of settings and circumstances in British Columbia today. The focus of the study is to identify and analyze the situational factors which influence a firm's choice of job evaluation plans, as well as to ascertain the impact these factors may have on plan effectiveness. Although studies indicate that there are numerous factors impacting on the effectiveness of each plan, research outlines only a very few actual qualitative criteria for plan effectiveness. Milkovich and Cogill discuss this problem and identify accuracy, reliability, acceptance and efficiency as assessment criteria, while Thomson states that plans should be approved on the basis of the "situational test" (i.e., the plan meets specific needs) and the "pragmatic test" (i.e., the plan is economical and comprehensive). The emphasis on organization specific criteria is further developed by Brett and Cummings who suggest the following effectiveness criteria: employee credibility, management acceptance, ease of
communication, administrative reasonableness, and theoretical soundness.

For the purpose of this study, the effectiveness of each sample job evaluation plan will be qualitatively determined on the basis of two fundamental criteria:

1. Does the job evaluation plan meet the needs and objectives of the concerned parties?
2. Does the job evaluation plan have employee, management and union acceptance?

The first section of the thesis provides a review of the pertinent literature on the componential factors of job evaluation plans and also outlines the methodology of the study. The second section contains the case studies of the sample plans. A discussion and analysis of the plan will follow in the third and concluding section.

This study does not profess to meet the recognized need for "scientific" research into job evaluation plan efficacy. Rather, it endeavors to examine the practical issues currently facing management and labour in applying job evaluation. In so doing, it is hoped that this study will provide insight into selecting and assessing situationally appropriate job evaluation plans.
Job evaluation was first developed and implemented, in the United States Civil Services, over one hundred years ago; however, it did not gain widespread usage until after World War II. At that time, job evaluation was the subject of rigorous research, yet by the mid 1950's interest in it, for the most part, had waned, and job evaluation research and practice was relatively static for the next twenty-five years. However, within the last decade the growing social awareness and government legislative support of equal pay for work of equal value has incited renewed interest in job evaluation.

As indicated in the introduction, the research has reflected quite diverse perspectives: that of "applied measurement", which emphasizes the instrumentation, and that of "institutional economics", which focuses on the contextual factors. This review extracts from both perspectives and discusses the effects of exogenous and indigenous factors on job evaluation plans. These factors are outlined below as follows: environmental factors, internal factors, evaluation methodology and plan administration.

**Environmental Factors**

**Labour Market Forces**

The objective of job evaluation is to determine relative value only and is not intended to provide the absolute value of jobs in terms of current dollars and cents. Therefore, job evaluation is generally accepted to be an aid to wage determination and not a sole determinant in and of itself. Nevertheless, the relationship between job evaluation and wage determination is not straightforward. While pay is the measure of the market value of employees according to the supply and demand for their skills, job evaluation is concerned with the relative value of these skills to the employing organization. Therefore, job
evaluation is challenged with reconciling the market value of the job with its relative value to the organization. An imbalance between internal equity and external parity can undermine the objectives of the compensation system. Therefore, the consideration of both external and internal comparisons in wage determination appears to be practiced in the field. A 1981 survey of twenty-four American firms indicated that a majority of the firms considered a combination of market rates and internal factors in determining pay levels while only approximately 15 percent of firms relied on job evaluation only.\(^8\)

In the uncommon circumstances where well established market rates do not exist for a particular labour force, a job evaluation plan can be applied freely. However, if market rates exist for a particular labour force, the job evaluation process will be working within the constraints of market determined rates. Although research has yet to offer a ready means of reconciling external and internal forces,\(^9\) studies have indicated that the higher the wage level of an organization relative to market rates, the greater the likelihood of success of a job evaluation plan. Conversely, if the organization's wage level is relatively low, it is more difficult for a plan to reflect changes in labour market conditions, and this inflexibility can create tensions in the compensation system.\(^10\) Therefore, with respect to labour market influences, it would appear that an organization's relative wage level may have a bearing on the effectiveness of the job evaluation plan.

Industrial Relations Environment

A comprehensive survey of job evaluation plans found that two (of five) major factors leading to the failure of these plans were trade union opposition to the plan and withdrawal of top management support (Baker, True, 1957).\(^11\) These factors may not be responses to the plan itself, so much as symptoms of the more encompassing industrial relations climate. Job evaluation can be a valuable tool in alleviating industrial conflict resulting from arbitrary and discriminatory wage decisions, fragmented bargaining, etc., and it
may also facilitate open communications regarding wages. Lupton and Bowey point out that, ironically, any plan will be difficult to implement in the kind of conflict-ridden situation where it can be most useful. This is not to discourage the establishment of a job evaluation plan. Rather, it emphasizes the importance of implementing a plan that is compatible with the industrial relations climate so that the utility can be maximized. Certainly, the industrial relations climate will effect such decisions as whether the plan will be unilaterally or bilaterally developed and will also affect the level of information accessibility.

Internal Factors

Installing a job evaluation plan and new wage structure can be a demanding and resource-draining venture, therefore consultants and scholars in the field of job evaluation recommend that practitioners perform an organizational needs analysis prior to implementing a job evaluation system. Common signals of a need for a job evaluation plan include wage drift, difficulties in recruiting, inflexibility in the use of labour, increases in classification and salary grievances, etc. Job evaluation has an integral relationship to the total salary and labour relations policies in an organization. Therefore, once the need for job evaluation has been recognized, a plan must be established to meet these needs as well as to serve the fundamental interests of the parties involved. Michael Armstrong in his book, Principles and Practices of Salary Administration, recommends consideration of the following internal factors when selecting a particular type of job evaluation methodology: the size and complexity of the organization, the types of jobs to be covered, the type of organization and its management style, the climate of industrial relations, equal pay, cost, time and resources available, and, the general pay situation. Other practitioners have elaborated on the specific target issues which should be addressed within a unionized environment: for example, how much control does management want to maintain over the wage structure?
Similarly, does the union want to jointly determine wage structure or simply reserve the right to challenge unilateral decisions? How much control and flexibility does management wish to maintain in organizing the workplace, and does the union want joint determination? Do both union and management value external parity? Are both parties committed to the principle of equal pay for work of equal value? What would be the desired effect of a job evaluation plan on wage negotiations and on the industrial relations environment generally? Addressing these questions may in turn lead to other matters requiring consideration. It is necessary to clarify both wage determination and industrial relations policies to ensure that the proposed plan is consistent with them.

On a more practical level, the organization should determine what operational purpose the plan is intended to serve. Again, this will be organization specific and may depend on the type and extent of problems existing within the wage structure. For example, a firm experiencing disproportionate wage differentials may endeavour to achieve greater wage scale uniformity, or greater flexibility may be required through increasing or decreasing the number of grades. Many firms aim to simplify a chaotic structure or establish greater control over the relationship between wages and work. When a more rational structure is in place, the job evaluation plan is generally expected to serve as a mechanism for correcting wage anomalies as they occur and setting rates for new jobs.

An organization should also take into consideration the intended uses of the information collected through the job evaluation process. For example, the product of the job analysis the job description - can be used as a guideline for staffing (hiring, transfers, promotions) as well as for appraisals. The evaluation process can also identify training needs, and can provide valuable information for workforce planning, human resources inventory and salary negotiations.

A very practical parameter of a plan is the amount of resources available. The implementation of a new or modified job evaluation plan can be costly, both in terms of
manpower costs and the potential increase to the wage bill as a result of classification changes. Because job evaluation is, fundamentally, a labour intensive process, maintenance of the plan will involve ongoing labour costs. Personnel costs will vary, naturally, depending on the size of the organization (and thus, the number of staff required to serve the organization's needs) and the complexity and time involvement of the evaluation methodology applied. The availability of human and financial resources is often determined by the level of top management and union executive support. It has been suggested that a high level of organizational commitment is a necessary prerequisite for a successful job evaluation plan. However, there are plans in practice which do not require vast financial and human resources and are capable of meeting many of the organization's needs. It is simply a matter of selecting a plan type that is a budgetary "fit".

Although not a panacea for all wage and salary problems, a job evaluation plan has great potential to be a useful organizational tool. However, a plan will only be as useful as its suitability to the specific organization, and thus the process of analyzing needs and resources is a critical one.

Job Evaluation Methodology and Administration

Once the organization's needs are assessed and the objectives of the job evaluation plan determined, the appropriate machinery to facilitate meeting these objectives must be established. The primary component of this "machinery" is the evaluation method; equally important, however, are the many components which establish the conditions within which the method is applied. When implementing and maintaining a job evaluation plan these components must be addressed to ensure a comprehensive, organizationally appropriate system.
Terms of Reference

The literature review, written from a Personnel perspective, is silent on the matter of establishing contractual terms of reference for a job evaluation plan. However, works written for use by trade unionists emphasize the need for contractual delineation through inclusion of a provision for a job evaluation plan in the Collective Agreement. Inclusion of such a provision binds the parties to a plan and facilitates a common understanding of the plan's mandate and scope. The role of each party participating in the plan, together with the procedural guidelines, can be clarified contractually. Although the terms of reference should be clear and well understood by all parties, this component should not be so rigidly defined as to be functioning at the expense of much needed plan flexibility.

Despite academic endorsement of establishing contractual terms of reference, a 1978 survey by H. Janes indicates that just 64 percent of the unions participating in the study have provisions in the Collective Agreement covering job evaluation, while close to 10 percent are involved on the basis of an "informal understanding". The figures are far less promising within British Columbia, where, in 1985, only 26 percent of Collective Agreements contained provisions covering job evaluation. Although these figures far from suggest universal acceptance of job evaluation provisions in the Collective Agreement, the suggestion is that, during the past decade, there has been an increasing awareness of the need to establish contractual terms of reference for job evaluation plans.

Union Involvement

The terms of reference will be determined largely by the level of union involvement in and concern with job evaluation. The recent trend in the literature favours joint union-management plan development and administration, reflecting a non-adversarial ideology. Janes' findings, indicating a modest growth of jointly designed plans, support this trend. Other authors, however, qualify their enthusiasm for bilateral involvement, suggesting that an
effective level of participation is dependent upon the union's view of job evaluation and the
general industrial relations climate. Indeed, while employers generally favour job evaluation,
there is no such consensus amongst trade unions. As pointed out in an A.F.L.-C.I.O. bulletin,
"union experience with job evaluation plans has varied widely. As a result, there is not a
single or overall union attitude or policy toward job evaluation." Historically, there has
been skepticism of job evaluation, particularly amongst craft unions, because of the perceived
effect on wage determination. Some unionists believe that job evaluation is detrimental
because it fails to consider all forces which determine wages (e.g., supply and demand) and
that it disregards both the ability of the individual and compensation for service.
Furthermore, they believe that job evaluation dilutes the value of traditional skills by
creating new occupations and classifications, and that it limits bargaining by establishing
rates on the basis of a pre-determined formula. Concern also exists with respect to the
focus of job evaluation on individual jobs. It is reasoned that when an employee can resolve
a pay grievance through job evaluation channels, it dilutes collective support of negotiations
as well as potentially playing one group of employees against another.

More commonly, now, unions accept job evaluation as a supplement to collective
bargaining, but remain apprehensive about its filling the traditional role of negotiations in
determining pay. Unionist William Gomberg refers to job evaluation as a "subordinate
gimmick", although he does go on to point out that unions have an obvious interest in the
distribution of relative increments. Janes has noted a significant decrease in union
resistance to job evaluation practices, coupled with an increase in the use of the grievance-
arbitration procedure to challenge the plan results. As job evaluation plans are growing in
use, it appears that unions feel the issue is not whether to accept or resist job evaluation
but rather how the union can best represent their members under the plan. Although,
superficially, it would appear that joint development and administration would ensure the best
protection of employee rights, certain problems can develop with bilateral plans.
Perhaps the most fundamental concern is the potential conflict of interest with respect to a union's representative role when it works alongside management. Some unionists believe that demonstrating a commitment to the system undermines their ability to question plan results, making them responsible for wage inequities and plan shortcomings. For example, it has been observed, anecdotally, that joint participation tends to weaken a union's position should an appeal be brought to arbitration. Concern has also been voiced regarding the training of union members in job evaluation skills, which may be perceived as their having been "indoctrinated" by management, thus alienating union representatives from their membership. With these concerns in mind, many unionists feel that employees' needs are best served by a unilateral plan where the union reserves the right to challenge management's decisions.

On the other hand, when participating in a bilateral plan it would appear that management should be accepting and capable of relinquishing its presumptive right to manage. Furthermore, the British Institute of Management cautions that a bilateral job evaluation plan cannot be viewed as an isolated exercise. Rather, if the joint venture is an innovative practice then it is likely to precipitate demands for further involvement in other areas affecting employment conditions. Management is advised to consider and prepare for such developments.

These concerns are not inevitably borne out in bilateral plans. The joint Steel Industry "Cooperative Wage Study Plan", in practice for close to forty years, is perhaps the most widely known example of a successful bilaterally developed and administered plan. However, the potential difficulties do emphasize the need to assess the parties' views and mandates as well as the industrial relations climate itself before becoming committed to a particular level of unilateral or bilateral involvement.
Job Evaluation Methods

Traditional job evaluation methods encompass a two-step process of collecting information pertaining to the tasks, conditions and requirements of a job and using this information to determine the relative value of that job to the organization. The first step is referred to as job analysis, while the second step is the actual evaluation process. Conventional methods of job analysis generally entail an analyst’s determining job content through interviews with the incumbent and supervisor, supplemented by incumbent-completed questionnaires and, possibly, observation of the job activities. The job content is then outlined in a standard format referred to as the job description. This technique of job analysis is classified as qualitative, while more recently developed techniques, such as the job element technique and the Position Analysis Questionnaire, are considered to be quantitative. Broadly speaking, quantitative techniques utilize a structured questionnaire which solicits objective information and/or scaled responses. The questionnaire answers serve to describe or "profile" the job, and provide a quantifiable basis for comparison. Researchers consider quantifiable techniques to be superior in terms of efficiency, validity and reliability, although they have yet to gain widespread usage in the evaluation process.

Once the job content information has been compiled the worth of the job is actually measured and hierarchically ranked through the evaluation process, and the job value is then translated into wage rates. The four conventional methods commonly in use include ranking, classification (or grading), point system and factor comparison. Ranking and classification are referred to as non-quantitative methods while the point system and factor comparison are considered quantitative methods. Numerous "unconventional" methods have been developed, such as the time-span discretion method (Jaques), decision banding (Paterson), problem-solving method (Charles), etc. It has been suggested that these methods are merely variants of the conventional methods,\textsuperscript{22} and thus they will not be discussed individually.

Studies on the convergence between evaluation systems have yielded mixed results.
Several studies, however, indicate significant correlation coefficients (ranging from a low of .82 to a high of .97), which suggest that, despite the methodological differences, similar results can be achieved using different techniques. Unions appear not to have a particular preference for any plan, although the point system is most commonly used.

In assessing each method there is a fundamental conflict between the need for simplicity and flexibility versus the need for consistency and accuracy. There are distinctive strengths and weaknesses with each method, as discussed below.

**Job Ranking Method**

Job ranking involves analyzing a job as a whole and ranking the value of all jobs in the organization from the highest to the lowest. The ranking can be achieved through the "order of importance" or "card sorting" method, which is like sorting a deck of playing cards in order from the ace to the deuce, or through the "paired comparison" method which compares each job against every other job being performed. The job ranking method is best suited for small firms where the number of jobs to be evaluated is not large, and its primary advantage is that it is the simplest and most straightforward method. It is relatively inexpensive to implement and maintain and requires little time and paperwork. The major disadvantage of the method is its subjectivity and lack of consistent standards. The rates are susceptible to the influence of the present pay of the job, the incumbent's performance or the prestige value of the job. And, although this method is easy to learn, no one rater is likely to be familiar enough with all jobs to accurately measure the worth and rank all the positions. Judgments may be arbitrary and not well documented, so are difficult to explain and defend. Additionally, job ranking does not outline actual differentials between jobs, and thus it is difficult to convert ranking to wage rates. Finally, job ranking becomes ineffective with more than forty or fifty titles.

Job ranking, therefore, appears to be best applied in a small (twenty-five jobs or less)
organization where employees trust the employer's judgement in ranking the jobs. Generally, job ranking is viewed in the literature as being better than no formal job measurement, but the least reputable of the job measurement methods.

**Job Classification Method**

Job classification (or grading) involves determining the number of classes or grades and the functions corresponding to these classes, then sorting jobs into these pre-determined classes on the basis of the common denominators that run through the jobs. The common denominators often used are the level of responsibilities, skills, knowledge and duties. As with the ranking method, a job is measured and valued as a whole. Benchmark or key jobs may be determined and utilized to indicate the type of work and level of responsibility of each class in the structure.

One advantage of the classification method is that most employees tend to mentally classify jobs in a hierarchy, thus it is an easily understood system. Furthermore, promotional sequences are readily evident in a classification system. Like the ranking method, it is a relatively simple, inexpensive method to administer. Job classification has greater flexibility than other methods; the comparative vagueness of the measurement standards provides versatility, particularly when dealing with technological change.

Nevertheless, the classification method is vulnerable to the difficulties besetting non-quantitative methods, that is, subjectively, ambiguity, and the lack of concrete and consistent factors justifying the rating. These limitations manifest themselves in the problems entailed in writing class specifications clearly indicating which factors should be rewarded. Pricing the wage structure and quantifying differentials between jobs are difficult and often indefensible to employees and unions. Another complication exists in developing descriptions for each job class which are sufficiently encompassing yet not so generalized that the jobs cannot be classified with some degree of precision. The classification system can become
cumbersome as the range of jobs increases and it becomes more difficult to compress many
different jobs into a limited number of classes. Increasing the number of grades
countervenes one of the main virtues of the classification method, that of simplicity. The
classification method is a relatively insensitive measuring instrument and does not recognize
that the various components of a job may fit into more than one level. Therefore, the
valuing and classifying of a job will depend on which component is considered. Errors in
classifying one job may set a precedent that can distort the entire structure.

Despite these limitations, the classification method is commonly found in government
agencies and has long been associated with the Public Service.\textsuperscript{25}

\textbf{Factor Comparison Method}

The factor comparison method, developed by Eugene Benge, measures a particular job
according to a number of pre-determined quantifiable factors. The value of the jobs is
added, resulting in a total numerical value for the job. This process first involves selecting
and clearly describing the factors to be used. Benge believed that the five factors of skill,
responsibility, physical effort, mental effort and working conditions exist in all jobs. These
five factors tend to be used in most factor comparisons plans. Key or benchmark jobs,
which serve as reference points for later evaluation, are selected and described. It is
important that the key jobs represent a wide range of pay-grades and are perceived to have
the right internal relationship to each other. They key jobs are then ranked under each of
the factors and the wage rate apportioned to the factors in proportion to their perceived
contribution to the total "price" of the job. Other jobs can then be compared against the
key jobs, under each of the factor headings, and a monetary rate calculated. The factor
comparison method is unique insofar as the process involves measuring and pricing jobs
simultaneously. It is perhaps this feature which makes factor comparison a contentious
method in unionized environments. Many theorists and practitioners feel that evaluating jobs
and fixing wages are two unique functions that should be kept separate. Combining the two is felt to encroach on collective bargaining and limit the flexibility of the job evaluation plan. Furthermore, the apportionment of wages among the various factors seem to be arbitrary and highly subjective.

The success of the factor comparison method depends largely on the selection of truly representative and equitable benchmark jobs. Either management or the union may wish to determine benchmark jobs and factor weights through negotiations. Obtaining acceptable and adequate benchmark jobs can be a problem particularly when the industrial relations climate is somewhat troubled. In addition, these jobs may change, unnoticed, over time, distorting the standards and compounding evaluation errors.

Because it is a relatively complex procedure, factor comparison is costly and time consuming to install, as well as difficult for employees to understand. Nevertheless, as a quantitative method it does permit more systematic job-to-job comparison than the non-quantitative methods. The factor comparison method is organization specific, since the key jobs and wage rates are from the organization itself, and is particularly suited to organizations embracing jobs that are not comparable to those in most other places of work. Once the method is installed it is relatively easy to administer.

Some of the problems of the factor comparison method can be circumvented by modifying or combining methods to keep the evaluation and pricing function separate. The Hay Guide Chart Profile, for example, is a simplification and modification of the factor comparison method. Developed by Edward Hay and Associates, it is used by that consulting firm primarily for evaluation of managerial jobs. Jobs are compared on the basis of three factors (know-how, problem solving and accountability) as well as working conditions, and sub-factors of these factors. A guide chart identifies, defines and scores the worth of each factor and is used to evaluate the job against the standards set in the chart. The Hay Plan is one of the more popular methods currently in use, with more than two thousand firms
applying it internationally.

**Point Method**

The point method is currently being applied more widely than any of the other methods. The point method evaluates a job by factors, as opposed to as a whole, with each factor carrying its own scale of point values. Each job is measured on each factor scale and the simple or weighted addition of these points leads to the total measurement of the job, which can then be used for wage setting. The implementation process is similar to that of the factor comparison method where the initial step is determining the factors to be measured. Additionally, with the point method, the number of degrees under each factor have to be outlined and described and point values assigned to each degree of each factor, based on increasing level of worth. Benchmark jobs can be utilized to determine initial points of reference and establish the framework within which other jobs can be evaluated. However, whereas the measurement process of factor comparison is more one of "ranking", the point method is somewhat similar to classification insofar as both systems involve comparing jobs to a pre-determined scale. Furthermore, while factor comparison tends to use market-determined wage rates as the basis for establishing its benchmark jobs, the point method tends not to account for market rates in the measurement process.

A valuable by-product of the point method is the development of a job evaluation manual which defines and describes the factors, degrees and point values. This detailed documentation of the evaluation "yardsticks" contributes to the consistency of application, stability and longevity of the system which are primary advantages of the point method. Furthermore, although the point method plan can be complex, costly and time-consuming to install, it appears to have greater validity over time because accuracy and consistency tend to increase with repeated use. Point rating is highly adaptable and can be applied in a unionized environment because the evaluation function and pricing function are kept separate.
Yet at the same time, the hierarchy or point values are easily converted to job and wage classes and readily lend themselves to the determination of monetary values.

It has been argued that the selection of factors, definition of degrees and the weighing of the point values are highly subjective and arbitrary. Once these components have been established, however, the evaluation of individual jobs tends to be more a objective and analytical process than with the other methods, because of the detailed standards for assessment.28

Despite its technical appeal, though, the point method has certain limitations. It can lack flexibility with respect to adequately addressing a wide variety of job characteristics with a limited number of factors and degrees. Conversely, the use of too many factors may result in the same aspect of a job being assessed many times from different angles.

Certainly, the effectiveness of the point method as a measurement tool is dependent upon the factors and points assigned. The point method also loses flexibility with respect to reflecting economic or technological changes. The quantitative approach, generally, tends to give a spurious sense of infallibility and accuracy. There exists the vulnerability that an artificial emphasis may be placed on minor differences in point values, thus creating unnecessary grievances. Furthermore, by virtue of the volume and nature of judgments made and the lack of decision checking, errors tend to be cumulative rather than random. The numerical scale facilitates a ready and direct comparison between jobs although the complexities of the scale development can cause employees to have difficulty understanding the process and rationale behind the value of their own job.

It would appear from the popularity of the point method that the advantages of the system outweigh the disadvantages. Furthermore, its wide usage permits comparison of results between organizations and within industries as well as enhances its credibility as an evaluation method.
Flexibility

To ensure reliable and valid job evaluation results and plan longevity, a structured, detailed framework that minimizes subjectivity should be developed. However, addressing this need exclusively may introduce detrimental rigidity into the plan. Plan inflexibility and inability to deal with changed conditions is one factor observers say leads to plan failure.²⁷ Theorists argue that a job evaluation plan must be responsive to the dynamic forces affecting wage determination, specifically economic changes. Because job evaluation does not replace collective bargaining of wages, general inflationary or recessionary trends can be dealt with at the negotiation table. However, changes in the labour market affecting only a portion of the membership cannot be so readily addressed. These sorts of changes are more appropriately dealt with through job evaluation; flexibility, however, must exist within the plan to accommodate selective labour market dynamics. The point method, for example, measures jobs on the basis of internal relativities and does not address external parity. Therefore, modifications to the plan would have to be made to facilitate responsiveness to the labour market.

Plan flexibility is also necessary to address the impact of technological change on job value, and is becoming of greater importance as the pace of technological innovation increases. Technological changes can significantly change the tasks of a particular position, but the challenge for job evaluation is to determine whether the actual value of the position has changed. In addition, evaluators may be making job-to-job comparisons between relatively noncomparable traditional jobs and automated jobs. Those with predetermined factors and weighted point scales tend to demonstrate the greatest inflexibility, because the factors weighted on the basis of non-automated jobs may be of greater or lesser significance in automated jobs. However, this can be mitigated if factor choices and weighting have been determined in anticipation of technological change. Furthermore, periodic reviews of the evaluation scale, benchmark positions and job hierarchy can ensure that the evaluation
"yardstick" is accurately measuring the impact of technological change on job value. It has also been recommended that the various phases of automation be recognized, providing for "interim" evaluations of positions in transition and avoiding inaccurate long-term measurement that may distort the wage structure.

Although infallible job evaluation plan techniques for adapting to economic and technological change have not been developed, it would seem that certain plan modifications as well as periodic assessments of the evaluation scale can meet the need for plan flexibility.

**Appeal Procedures**

As indicated, the comparative reliability and validity of the various method results is a debated point; no one method is error free. Because of the fallibility common to all methods, theorists and practitioners appear to unanimously recognize the need for some formal appeal or review process incorporated into the plan. This provides recourse to an employee or supervisor who feels that a job has been incorrectly evaluated. The appeal mechanism can be implemented in a variety of ways, although it is, naturally, preferable that appeals are not referred to the original raters. A 1979 survey by Bradley indicated that 75 percent of the participating companies had formal appeal procedures, and 79 percent of those were linked to the grievance procedure. Although parallel figures are not available pertinent to British Columbia organizations, the high number of job evaluation arbitration decisions filed in the past ten years implies that this manner of appeal is well exercised. It is not uncommon, however, for organizations to establish an appeal body whose jurisdiction circumvents the grievance-arbitration process. There is no evidence available suggesting which method is more advantageous. Regardless of the type of mechanism, an appeal procedure serves a variety of purposes. It is an administrative check to ensure evaluator objectivity, and in the absence of "scientific proof" that an evaluator's judgments are accurate, an impartial appeal body can also enhance an employee's perception of the process' fairness. As well, it provides
the union with an opportunity to represent its individual members' interests and provides management with the opportunity to demonstrate a commitment to an unbiased system. Until such time as an error-proof method of job evaluation is developed, an appeal procedure within the job evaluation plan will remain a key component.

Information Accessibility

A not unpredictable employee reaction to an examination of their jobs and possible adjustment to their salaries is that of suspicion. Without full information on plan implementation and administration, adverse reaction will grow and eventually undermine the effectiveness of the plan. If a job evaluation plan is to succeed, it must be perceived by those involved as being fair and equitable. In order to accomplish this, the plan should be clearly documented and employees and unions should have access to those documents. Furthermore, the methodology must be well understood so that employees will have confidence in the plan and recognize the relationship between their jobs and their pay rates. Although union response to job evaluation is mixed, the desire for full information about the plan is shared by all. The A.F.L. - C.I.O. point out that job evaluation information is necessary for reasonable bargaining and adequate representation of the membership, particularly in the event of a classification appeal.30

Despite general recognition of the need for full information, Bradley's 1979 survey indicated that only 28 percent of the sample exercised full accessibility of information, while 65 percent of the organizations allowed only partial accessibility, including the exclusion of the job analysis information itself. Bradley goes on to emphasize that a plan "implemented in an arbitrary and secretive manner is liable to harm rather than benefit employee relations."31
Administrative Control

A further means of enhancing the job evaluation plan effectiveness and employee confidence in the plan is through stringent administrative control. Studies indicate that the longer the plans have been in operation the greater the likelihood the difficulties will arise. Plan deterioration is not inevitable, however, and can be avoided through the practice of regular plan "audits". By periodically reviewing the total wage and job structure, job changes and wage drifts can be identified and job descriptions brought up to date. Furthermore, any wage or position development trend can be noted in order to provide valuable information for negotiations or organizational changes. Without regular reviews of the plan, anomalies and inequities will develop and compound within the structure, defeating the primary purpose of job evaluation.

Another condition necessary for the successful operation of a job evaluation plan is centralized coordination of the scheme. It is recommended that the responsibility for control should fall with the Industrial Relations or Personnel division's sphere, and that all new or changed jobs be evaluated by the designated group. Centralization of the plan is important to ensure consistent adherence to evaluation standards and continued reliability and accuracy of results.

Integration with the Collective Agreement

Regardless of whether the job evaluation plan is provided for within the Collective Agreement or in a supplementary format, the plan must be compatible with the intent of other related provisions in the Agreement. These provisions may range from the wage schedule itself to the issue of subcontracting. The extent of interaction between the job evaluation plan and the various provisions will depend largely on the contractual detail of the plan and how the evaluation information is utilized. The most straightforward relationship is between the job evaluation plan and the wage structure. The job evaluation results are
bound by the existing wage schedule insofar as the purpose of such a schedule is to ensure that equal work will be compensated by equal pay and that relevant differences in job requirements are reflected in monetary value. Therefore, when, upon evaluation of the job, an employee is assessed to be performing work within a classification set out in the Collective Agreement, the employer is bound to remunerate him or her at the pay rate provided for by that agreement. It should be noted, however, that although classifications may be outlined in a contract, they are not "frozen", hence, classes may be added or deleted from the structure during the life of the contract.

The relationship between job evaluation and management rights to organize the workplace is not so straightforward. In the absence of a specific qualifying provision, management has a presumptive right to organize the workplace which may involve altering the content of existing classes, abolishing or creating classifications, etc. Job evaluation in this instance, is a means of ensuring that management rights have not been exercised in bad faith and that the employees' wages have not been altered arbitrarily as a result of a unilateral reorganization. Similarly, the job evaluation plan may be utilized for the delineation of bargaining unit work with respect to subcontracting, exclusion from the bargaining unit, etc.\textsuperscript{52}

Seniority rights, in many Collective Agreements, are defined in terms of "classification seniority" and can effect many functions, such as transfers, promotions, demotions and, perhaps most critically, lay-offs. The greater the integration of job evaluation with other contract provisions, the more critical the need for detailed, mutually agreed upon job descriptions. Arbitrators have noted that one of the major problems arising from classification related grievances is the lack of comprehensive job descriptions, placing the arbitrator in the difficult position of job analyst as well as adjudicator.\textsuperscript{53} This lack of job clarification can also manifest itself in performance problems, if mutual understanding of job duties, requirements and standards does not exist.
Wage and Classification Structure

The purpose of job evaluation is to assess relative job content so that jobs can be ordered according to their different values. Once this "pecking order" is determined, the results are converted into a wage structure. The sequence of steps followed in this conversion process varies depending on the particular evaluation method used; however, most begin with job measurement, then moving to job grading and monetary conversion. The various processes of job measurements have already been discussed at some length. Job grading involves the grouping of jobs of similar difficulty, skill requirements, etc., and assigning one salary or salary range to all jobs within that group. The jobs in any particular grouping are not necessarily similar in nature; rather they are all considered to be of equal salary value.

Defining and pricing the grades can be a highly technical element of wage and salary administration, and have been studied comprehensively within that context. For the purposes of this study, however, only certain points of consideration in establishing and maintaining a job evaluation plan will be discussed. Firstly, the motivational impact of differentials should be taken into consideration when selecting the number of job grades. Although it is recommended that the numbers of classifications should be kept to a minimum for ease of administration, too few grades make promotion opportunities poor and can be demotivational for employees. Conversely, where there are too many job grades, employees have a difficult time perceiving tangible differences in the job content of adjacent grades. This may lead to grievances and feelings of unfairness, as well as, continuous attempts to leap frog into higher grades. Furthermore, a larger number of job grades can restrict management's ability to assign occasional tasks not explicitly provided for in the job description. The British Institute of Management suggests that six to eight grades would adequately cover all non-manual jobs for small organizations, eight to twelve grades for medium organizations, and a somewhat greater number for very large organizations with a wide range of activities.
These numbers will vary, of course, depending on the range of jobs being evaluated.

Another important policy decision involves dealing with under or over-payments discovered through job evaluation. Certainly a primary concern of unions is that members will suffer wage reductions as a result of job evaluation. Overpayments, however, can be dealt with in a variety of ways without jeopardizing an employee's wage rate. "Red-circling" - i.e., "freezing" the salary rate of a downgraded position - positions is a common means of eventually rectifying a wage anomaly. As well, altering job content upwards to bring job value into line, buying out the overpayment with a lump sum payment or phasing out the overpayment with a schedule of payments, are other salary treatment options. The method of dealing with overpayments will likely be covered in the Collective Agreement, as wage protection is of primary concern to unions.

It is not uncommon for the total wage bill to increase as a result of the installation of a new job evaluation plan and wage structure. This is due to the discovery of pay inequities as well as the tendency of employees to use job evaluation as a lever to improve their wage position. Because many of the benefits of a job evaluation plan are qualitative, it is difficult to do a cost-benefit projection prior to installation. However, organizations should assess the financial feasibility of implementing a scheme which will, in all likelihood, increase their wage bill.
CHAPTER II
METHODOLOGY

The preceding literature review demonstrates the existence of a diverse range of theories and research findings regarding the various components of and influences on job evaluation plans. As outlined in the introduction, this study intends to identify the factors that management and labour perceive to be most salient, as well as to assess the impact these factors may have on plan effectiveness. A small sample of plans has been selected for examination and the observations arising from each plan have been documented in the form of a case study. The limitations of the case study methodology - e.g., the reliance on subjective interpretation of data results and the qualified applicability of the results - were considered. However, it was believed that far more comprehensive and illuminating data could be gathered utilizing a case study research methodology. Additionally, the "ad hoc", flexible nature of this methodology was deemed to best facilitate the recording of any observed factors not anticipated from the literature review. Therefore, the limitations of the methodology appeared to be offset by the advantages and it was maintained that the case study research methodology was appropriate for this study.

The information outlined in the literature review was assimilated and analyzed, and, on that basis, a framework by which to compare the sample organizations was designed. This framework facilitates the examination of major factors affecting job evaluation plan appropriateness and effectiveness. The influence of the factors on job evaluation and how they are addressed by each sample organization was thus also studied. The factors were grouped into four general areas: (1) history of the job evaluation plan, (2) environmental factors, (3) internal factors, and (4) components of the job evaluation plan.
Data Framework

History of the Job Evaluation Plan

In gathering historical information, the intent was to identify any outstanding circumstances or factors facilitating the choice and implementation of the existing plan. As some features may be a product of the job evaluation plan's history, it is theorized that understanding the historical milieu and the developmental process will thereby enhance the understanding of current administrative policies and effectiveness.

Environmental Factors

Labour Market Forces and Economic Conditions

This study has endeavored to control for labour market dynamics; however, because research has indicated that an organization's relative wage level may influence the effectiveness of the job evaluation plan, each firm's wage scale was reviewed and compared against market rates to determine the firm's relative wage position, and what impact this may have on plan effectiveness.

The effect of economic policy (i.e., the Compensation Stabilization Program) on wage determination and the job evaluation plan has been noted, where applicable. Of particular interest, for example, was the question of whether externally imposed ceilings on wage increases precipitate a rise in attempts at individual increases through reclassification reviews. Similarly, the manifestations of budget restraint and its impact on the job evaluation plan was also documented.

Industrial Relations Climate

The industrial relations climate has been shown to be an important pre-determinant of plan effectiveness. The industrial relations environment of all the firms was noted and, where statistics were available, the following were used as "climate indicators": the strike
rate in the past ten years, the number of grievances and arbitrations filed in the past ten years, and the number of joint union-management working committees in existence. In addition, subjective assessments of the union-management relationship were solicited from each party.

Internal Factors

The most variable elements when comparing job evaluation plans were assumed to be the internal factors, e.g., management support, the organizations' financial state, compensation policies, classification needs, industrial relations policies and needs, human resources planning needs, etc.

A "checklist" of common exigencies, as outlined in the literature, was used to identify the sample organizations' specific needs. Examples of possible operational goals include improving or rationalizing the wage structure, establishing a consistent mechanism for correcting wage anomalies and setting wage rates for new jobs, improving the industrial relations environment, etc. An organization's specific use of the information gathered through the job evaluation process was also noted. For example, this information can be utilized for employee performance standards, staffing, training, etc.

The more fundamental policy positions studied reflected management and union interests in maintaining or sharing control in wage structure determination and in organization of the workplace. These interests can be served or hindered depending on the type of job evaluation plan implemented. Again, a checklist served as a guideline for collecting data regarding organization specific policies and interests.

Organization commitment to the job evaluation plan was measured by the amount of resources (human and financial) allocated to plan implementation and maintenance, and the correlation, if any, between resources available and plan effectiveness was noted.
Components of the Plan

The specific components regarding evaluation methodology and plan administration, detailed in Chapter I, are most frequently discussed within the literature and thus are considered as key plan components for the purpose of this observation. Therefore, each sample job evaluation plan was described qualitatively in terms of the following components:

1. The terms of reference (supplemented by any pertinent documentation, e.g., the Collective Agreement, job evaluation policy/procedures manual, etc.)
2. Union Involvement
3. The type of evaluation method applied
4. The provision for an appeal process
5. The provision for technological change and/or significant economic or labour market change
6. The degree and method of information dissemination and accessibility
7. Administration control
8. Integration with the Collective Agreement
9. The overall wage and classification structure

Sample Selection

When selecting the sample organizations, the intent was to provide a meaningful and valid comparative base. To that end the following criteria and parameters of selection were established:

1. To control for labour market dynamics, the sample organizations should employ a similar labour force composition (e.g., office and technical employees) and the labour force should be unionized. With the majority of the employees in the same labour market it is assumed that each job evaluation plan will be equally affected by labour market forces.
2. To control for the requirements of job evaluation plan occupational suitability, the sample organizations should employ a similar diversity of occupational groups.
3. To control for the administrative requirements of a job evaluation plan (e.g., cost, coordination, communication), the sample organizations should employ similar numbers of employees.

4. To compare the appropriateness of a variety of evaluation methods, the sample organizations should utilize different methods.

5. To compare the impact of economic policy on wage determination and job evaluation, the sample organizations should be subject to varying economic policy constraints (e.g., comparing public sector under the Compensation Stabilization Program, to private sector under no legislated constraints).

In 1982, seventy-nine Collective Agreements within British Columbia (26.2 percent) contained provisions covering job evaluation plans. The organizations applying job evaluation represent a wide variety of industries, although a significantly higher percentage of public sector employees are covered by job evaluation plans than private sector employees (68.3 percent versus 44.9 percent). In addition to the above noted criteria, logistical constraints dictated that only those organizations with administrative headquarters in Vancouver were contemplated for the sample. The sample selection was further narrowed on the basis of personal recommendations from specialists in the job evaluation field. Plans were recommended because their particular environmental and internal circumstances were perceived to offer insight into a variety of contextual issues facing organizations today.

Cooperation to participate in the study was sought from both management and unions in these organizations. Both parties of the following three organizations agreed to participate and thus become the sample organizations: (1) British Columbia Telephone company (BC Tel) and the Telecommunication Workers' Union (TWU), (2) British Columbia Hydro and Power Authority (BC Hydro) and the Office and Technical Employees' Union (OTEU), and (3) University of British Columbia (UBC) and Canadian University Employees (CUE).

Data Collection

The comparative data framework, described earlier, was expanded into a standard interview format (see Appendix A). The data were collected through a series of personal and
telephone interviews with management and union representatives. The information thus obtained was supplemented by various pertinent, such as the Collective Agreements, the job evaluation manuals, company procedural documents and correspondence, and union newsletters, as well as, samples of job descriptions or standards from each organization. Once all the data were collected and organized into a case format (see Chapters III, IV, and V) the information was analyzed to determine what environmental and internal factors were most pertinent to the job evaluation plan, in each instance. Based on theories of job evaluation plan effectiveness a job evaluation plan prototype or "model" plan was synthesized. Using the model plan as a standard, in addition to the criteria of effectiveness developed in the introduction, each job evaluation plan was analyzed in terms of its effectiveness. The next phase involved a comparative analysis of all the plans to identify common exigencies and note how each plan addressed these factors. Based on these observations, criteria for assessing plan effectiveness were synthesized. The limitations of the case study methodology, in terms of applicability of results to the general population, are certainly recognized. However, in this study, the position was that the variables within each sample organization were not sufficiently unique to preclude the applicability of the results.
CHAPTER III
BRITISH COLUMBIA TELEPHONE COMPANY
and
TELECOMMUNICATION WORKERS UNION
JOB EVALUATION PLAN

The job evaluation plan in effect at British Columbia Telephone Company (BC Tel) covers approximately thirty-five hundred workers employed in over four hundred classifications within the Clerical Division of the Telecommunication workers Union (TWU). The distribution of employees amongst the classifications forms an almost perfect Bell curve. The largest classes of this relatively homogeneous clerical group are the Service Center Clerks, placed within the mid-range pay groups, while the classifications of Mail Messenger and Computer Console Operator exemplify the lower and upper pay groups respectively. There are two other employee divisions within the Union: the Plant Division which includes maintenance and journeyman occupations, and the Traffic Division, which consists primarily of operators. The wage rates for these divisions are bargained for separately between BC Tel and TWU, rather than being subject to the job evaluation plan.

The BC Tel job evaluation plan currently in use was actually instigated by Bell Telephone (Canada) forty years ago. Prior to 1946, wages were set in a decentralized manner by individual departments within their own particular budgetary constraints. Bell Telephone, perceiving a need for orderly, consistent and centralized grading, examined a number of possible systems. They eventually settled on a factor point system because it was deemed to be most capable of producing the results they wanted, i.e., it was a plan that could rank non-market comparable jobs (which are common in telecommunications) against market comparable benchmarks (e.g., accounting clerk, clerk typist, etc.), thus establishing a job matrix. Once the matrix is established, the system serves to maintain internal equity on an
ongoing basis. The plan selected was customized to fit the specific requirements of the telephone industry. Bell encouraged telecommunication companies across Canada to adopt this plan, thus leading to the implementation of an industry standard job evaluation plan.

Although modifications to the plan have been formally contemplated on two previous occasions, no significant changes have been made to the plan since its inception. The plan has always been unilaterally administered by the Company, with the contractual provision for "joint consultation with the Union on new job classifications ... and re-evaluations", as outlined in Article 7.1 of the Collective Agreement. The Collective Agreement also provides for application of the grievance procedure in the event of a job evaluation dispute. In 1982, a Letter of Understanding was signed by both parties which further clarified and detailed the union's role in the job evaluation process. This agreement, however, did little more than provide for Union "participation" in the establishment of a new classification and/or re-evaluation review, while also clarifying its right to challenge the Company's decision through arbitration. The Agreement did dictate Union access to job evaluation and analysis information in addition to entitling the Union to participate in a job audit or interview.

Maintaining unilateral administration of the job evaluation plan is of utmost importance to the Company and is seen to be integral to upholding the fundamental management right of controlling salary expenditures. Because of its accountability to the shareholders and its adherence to "the bottom line", the Company does not want to lose control of wage and salary administration, either through joint administration of the plan or through outside party analysis and evaluation decision making (e.g., by consultants and adjudicators).

The BC Tel factor point plan evaluates the following ten factors: mental development, job knowledge, analysis and judgement, physical effort, mental attention, responsibility for accuracy, responsibility for business relations, responsibility for confidential information, responsibility for the direction of others, and job conditions. These factors are assessed in
terms of "degrees" or subfactors which indicate the level of difficulty or magnitude of
difference within each factor. Descriptive and representative examples of each degree are
provided as the standard of measurement. For example, the "Job Conditions" factor is
measured by the following two "degrees":

A. No unusually undesirable conditions associated with the work. (Zero point
value).

B. Work must be performed with unusually dirty media or equipment (oil, grease
or printer's ink), or in unusually dirty locations and results in soiling hands
or clothing to an unusual extent. (Value of 10 points)

The number of degrees within each factor vary from two to no more than eight.
Theoretically, the evaluation process involves a factor by factor comparison of a position to
all other positions within the clerical division. Needless to say, this would be an extremely
time-consuming and cumbersome process, so that the experienced analyst will use only those
positions which he/she deems to be pertinent for comparison. On the basis of such
comparison, each factor is assessed as to its degree, this degree having a predetermined point
value attached to it. The point values of all ten factors are totalled and this total is used
to slot the position into one of the ten wage groups corresponding to the point total.

A re-evaluation can be requested by the employee, supervisor, Union or analyst but, as
stipulated in the Collective Agreement, only where there has been a change in duties. Upon
receipt of a legitimate re-evaluation request (there are approximately eighty reviews per
year), one of the five Classification Analysts will forward a job content questionnaire to the
incumbent for completion. This step is followed by an interview with the incumbent,
supervisor and any other relevant party. The analysis of the position is documented on a
"Substantiating Data Sheet" which indicates each degree designation and identifies the
relevant tasks considered under each factor. The supporting documents also include a list of
those positions which were used for the comparative analysis. At the time of analysis, a
clerical job posting and job description (which has been verified by the incumbent and
supervisor) will also be developed from the job analysis information. In accordance with the
1982 Letter of Understanding, all this information plus the completed questionnaire and the Classification Analyst's worksheet and interview summary notes are forwarded to the Union. The employee will only be provided with the disposition of the re-evaluation review. (The current level of openness is a significant improvement from that prior to 1972 when the Union was not even advised of the factors being evaluated. The TWU purportedly went to arbitration with an admittedly weak case simply as a means of receiving information on the evaluation methodology.)

Disputes regarding job descriptions, factor ratings or classifications are dealt with through the grievance process. If agreement is not reached through grievance (a one-step process), the matter is referred to arbitration. The Collective Agreement empowers the arbitrator to "determine the correct wage grouping, consistent with an appropriate application of the established job plan." Additionally, when a new classification is being disputed, the sole arbitrator is authorized to determine the suitability of evaluating the new job under the plan. When a new classification is thought to be excluded from the plan, it is within the arbitrator's jurisdiction to establish a wage rate for such a classification.

The grievance rate over classifications is reportedly low, with an even lower rate of arbitration. In recent years, no formal grievances have been filed and, according to BC Tel records, only three arbitrations have ever occurred. The Company and the Union have differing conjectures as to the low dispute rate. The Company believes that the methodology is valid and accurate, so that it is unproductive for the Union to contest the decisions. The Union's reluctance to pursue arbitration stems from a 1983 award which questions the arbitrator's jurisdiction to set wages for contested classifications. With this interpretation as a precedent, the Union did not feel it was fruitful to resolve disputes through arbitration. However, a recent conciliator's report reaffirmed the arbitrator's jurisdiction in determining the appropriate wage rates. As a result, the Union feels that arbitration is, once again, viable recourse in the event of a dispute.
Another factor conceivably contributing to the low arbitration rate is the practical limitation of manpower under which the Union operates. The individual previously assigned to review all classification matters was not re-elected to office and thus this task has been re-assigned as just one of numerous responsibilities, to a Business Agent. Therefore, even though the Union, as provided for in the Collective Agreement, is notified of all classification changes, it is functionally limited to questioning only those matters which have been brought to its attention as being particularly problematic. TWU is proposing to hire a job evaluation specialist as a Staff Representative, assigned full-time to job evaluation; however, the commencement date is still uncertain.

BC Tel, on the other hand, maintains a staff of five full-time analysts to administer and maintain the job evaluation plan. These positions are entry-level positions within the Human Resources Division. Consistent with the Company promotion policy, these positions are generally filled internally. When recruiting, the Division seeks individuals with supervisory experience in the particular functional job group in which they would specialize as analysts. Additionally, consideration is given to the promotional potential of the candidate within the Human Resources Division. Analysts are provided with on-the-job training which begins with an overview of the Human Resources Division and its functions, as well as a review of the Collective Agreement and current Industrial Relations issues. The analyst will then work alongside a senior analyst for approximately three to four months, before working independently. Even then, there exists continuous consultation between analysts over various reviews and issues, thus enhancing on-going professional development. The period of time required to become fully conversant with the process is estimated to be one year. The average tenure in analyst positions is approximately three to four years.

As TWU's assignment of manpower appears to indicate, "policing" the job evaluation plan is "not the priority" for the Union at the moment, according to the Union representative. However, years of Union dissatisfaction with the methodology culminated in 1982 when a
Letter of Understanding, instigated by the Union, was signed, launching a Special Joint Job Evaluation Plan Review Committee. The committee is composed of three Union representatives (a Business Agent and two member delegates) and three Company representatives (the Industrial Relations Manager, the Classifications Manager and a Senior Analyst). The mandate of the committee is worded as follows:

- to establish term definitions applicable to the process and administration of the Clerical Job Evaluation Plan, such as "classification", "Evaluation", "re-evaluation", "job description", "position", etc.
- to consider modifications to the BC Tel Clerical Job Evaluation factor point rating plan.
- to test the application of a mutually agreed upon modified plan (or plans) by establishing, analyzing, describing and evaluating an appropriate number of benchmark jobs.
- to recommend to their principals on the implementation of a modified job evaluation plan.
- to perform other related functions as determined by a majority agreement of the committee.

Modification of the factor point plan was a Union priority at the time the committee was established. After studying a number of other plans in existence and examining the BC Tel plan, the Union had concerns about the fairness of some of the factors and the inconsistency with which they were evaluated. For example, the "Job Knowledge" factor was felt to be highly subjective and the decreasing value of the higher degree levels to be unfair. The weighting of "Mental Attention" and "Responsibility for Direction of Others" was felt to be inappropriate and inconsistent with the remuneration of standards of managerial positions. Inclusion of the "Physical Effort" factor was seen to discriminate against the majority of clerical positions. Therefore, the Union aimed to rectify these concerns through the joint committee. Of the various methodologies which TWU considered, the point factor system was favoured because the factorial measurement was believed to be more specific than a "whole job" (e.g., classification system) approach.

At the onset of the review, the Company established an agreement with the Union precluding the review from changing the current ranking of the positions. Consequently, there is no intention of changing the wage structure, per se, or the existing classifications.
Rather, any modifications to the plan (specifically, the elimination of the "Job Knowledge" factor) would serve for future applications. The committee is currently testing the reliability of the modifications and working through a computer program which would redistribute the existing point values attributed to job knowledge. To date, however, this exercise has been unsuccessful.

There is no time frame for implementation stipulated in the Agreement although, initially, the parties had targeted 1985 as the implementation date. At the time of the original interview (February, 1986) one of the Union committee members hoped that the project could be completed by June, 1986. Over three years have passed since the signing of the Letter of Understanding and it was feared that it would become increasingly more difficult to keep up a working momentum as more time passed. The Company representative maintains that the quality of the review results is the more important goal and should not be compromised in order to implement the results by an arbitrary deadline.

The joint committee has also been contemplating modifications which would enable the plan to accommodate technological change more effectively. Under the current provisions, certain positions are exempt from the job evaluation plan in recognition of the limitations of the methodology, and wage group determination is negotiated separately for these positions. Included in this list, which is detailed in the Collective Agreement, are a number of Computer Operator and Machine Operator positions. A Company representative explained that the plan was originally intended to measure "traditional" clerical jobs, therefore, certain non-clerical jobs cannot be accurately ranked. The classification of Salesperson, for example, has been historically excluded because of the "unmeasurable" personality requirements of the position. The Union representative is satisfied that automated jobs can be measured through a composite of existing factors, so the plan is perceived to be reasonably accommodating of technological change. Where limitations exist, they appear to be adequately mitigated (for the time being), by the provision for separate negotiations of these anomalies.
Independent of the Joint Job Evaluation Plan Review Committee, the Company performs a regular review of the classification system as part of the plan administration. This process ensures that all positions are reviewed and updated, if applicable, at least every five years. The Company also believes that continuous review and updating of the positions are inherent in the factor comparison process. The Analysts do have the authority to initiate a review to rectify any anomalies they may observe during the course of their analysis of a particular position. Furthermore, every two years a regression analysis of market survey wage data is performed to ensure the benchmark positions maintain external parity.

Despite these system checks, the wage schedule has been prone to "wage creep" or "drift", a gradual upward movement of the wage rates. Wage creep, apparently, is a symptom of the analysts' tendencies to settle on the higher wage grouping when a point total is "on the fence" between two wage groupings. The Company representative does not believe that this tendency affects the accuracy of the differentials, and any long term effect on the wage schedule, as a whole, can be rectified through negotiated changes to the salary structure.

The BC Tel job evaluation plan considers internal equity, only, in the process of determining the value of a position. However, contract negotiations offer a vehicle for ensuring that the wage schedule is maintaining external parity as well. Currently, BC Tel offers salaries that are comfortably above the (unionized) market rates for clerical employees in Greater Vancouver. For example, the salary range for a clerk typist within B.C. Tel is $1474.57 to $1735.22 per month, compared to the market rates of $1103 to $1450 per month. Therefore, labour market rates do not appear to negatively affect the maintenance of internal equity through the job evaluation plan.

The classification schedule and the job evaluation plan are relatively independent of most other provisions within the Collective Agreement. For example, layoffs and bumping which, in many other Collective Agreements, are generally implemented on the basis of a blend of seniority and classification, occur strictly on the basis of seniority at BC Tel, with
no regard for classification. On the other hand, the terms of contracting out are clearly defined in conjunction with the existing classification schedule, prohibiting the contracting out of work "regularly performed by the classifications set out in this Agreement" without dispensation from the joint committee on contracting out. The Company maintains that the focus of the job evaluation plan is quite singular and therefore, independent of other labour relations functions. The Union shares this view of the plan scope, perceiving the plan as a unique tool of relative wage determination.

Neither the Union nor the Company has an active education program in practice with respect to job evaluation. The Union did send a copy of the evaluation plan to all its members some years ago, suggesting they evaluate their own jobs, and, if the existing evaluation did not concur with the actual value of the position, encouraging them to apply for a re-evaluation. The Union recognizes that the education process should be stronger, but launching an information/education program prior to the implementation of the modifications contemplated by the joint review committee, is not deemed to be worthwhile by the Union. The Company does not assume responsibility for educating the employees in the plan beyond an explanation of the process to those involved in the review process.

A formal assessment of the effectiveness of the plan has never been performed by the Company or the Union. At the time the joint review committee was struck, the Union had been examining the plan and comparing it to other plans in practice. The criteria it was using were fairness, consistency and comprehensiveness, although it had no means of measuring these factors quantitatively. The Union did, however, specifically pin-point factors in the methodology which were believed to be unfair, inconsistent and incomprehensible, and developed a clear plan of how to improve these factors. One of the goals was to simplify the plan, making it more readily understandable to employees and analysts. High turnover amongst analysts, the Union speculates, precludes them from becoming sufficiently conversant with the complexities of the plan process to produce consistent evaluations. A simpler plan
would facilitate better understanding and, ultimately, sounder decisions. The Union representative believes that, upon implementation of the joint review committee modifications, the plan will be generally acceptable to the Union.

The effectiveness, is assessed by the Company, in terms of the objective of the job evaluation plan, which is to maintain a rational wage structure. Accordingly, the validity and reliability of the results become the measurement of plan effectiveness. The evaluation results are not formally tested, although it is argued by the Company that the analysis and evaluation process itself entails a continual check of reliability. The Company maintains that employee understanding and acceptance of the plan is not at issue because it is the analysts who are the users of the plan. Furthermore, "user" (analyst) acceptance would be manifested in the quality of the results, in which the Company has full confidence. The Company does not perceive the turnover rate amongst analysts to be a problem. In fact, the Company representative maintains that analyst "freshness" and commitment is key to plan effectiveness, therefore, the average length of service (three to four years) is believed to be optimal.

The results of the job evaluation plan are under the scrutiny of federal human rights legislation protecting the principle of equal pay for work of equal value. The Company is mindful of the issue of comparable worth, but believes the existing job evaluation plan is capable of a non-discriminatory assessment of value. A complaint was filed against the Company under the Human Rights Act, with respect to the differentials between the classifications of Building Serviceman and Building Servicewoman, the result of which was the negotiated creation of one class entitled, "Building Servicepersons". These classifications are covered by the Plant Division, however, so are not within the jurisdiction of the job evaluation plan. Achieving equal pay for work of equal value is not a high priority for the Union, perhaps because it does not believe the plan is inherently discriminatory.

The Company views the fundamental purpose of the job evaluation plan as that of measuring wage relativities within the firm. The information gathered through the evaluation
process is used primarily for that purpose; the "by product" information is used for job postings, negotiations research and, less frequently, organizational re-structuring. Although the Company representative is satisfied with the evaluation results, the process is seen to be dysfunctionally slow and time-consuming. This is not a budget concern--the plan is not under any budget constraints, per se (the cost of the plan administration and resulting classification salary increases is guessed, by the Management representative, to be approximately one quarter of a million dollars)--rather, it is a concern with the eventual obsolescence of the plan. The plan was established over forty years ago during an era when jobs were relatively static in nature. However, since the introduction of the plan, BC Tel has experienced a number of changes which impact on the stability of the plan. For example, de-regulation of the telecommunications industry has created new and diverse markets which, in turn, have created new classifications of positions. Conversely, recent downturns in the economy have necessitated layoffs. These reductions in staff involve significant organizational changes and changes to the divisions of labour which impact on job classifications. Therefore, since 1970, the functions and positions within BC Tel have been changing rapidly and the ability of the factor point system to adequately handle the volume and pace of this change is being questioned. Because of the subjective nature of the job analysis and evaluation, little of the existing process can be automated. A change in methodology is not being actively contemplated; however, the Company representative speculates that the factor point methodology has reached the limit of its effectiveness in the face of increasing technology, corporate diversity and economic instability.

From the very onset of the job evaluation plan, BC Tel has clearly articulated the goals and scope of the job evaluation plan as being a management tool for the determination of internal wage relativities. The Company has been purposeful in maintaining unilateral control over the plan, which is reflected in the negotiated terms of reference contained in the Collective Agreement. Plan effectiveness is assessed on the basis of the accuracy and
reliability of the evaluation results, which is checked, by virtue of the evaluation process itself and, through regular audits of all the classifications. It appears, therefore, that the job evaluation plan has satisfactorily met the needs of BC Tel and fulfilled the Company's criteria of plan effectiveness and suitability, to date. As noted above, however, the concern exists that the plan may not have versatility, flexibility and practicality to meet future needs.

On the other hand, the Union's role, *vis a vis* the job evaluation plan, has been primarily reactive. They have, gradually, negotiated provisions into the Collective Agreement which have clarified and strengthened their right to challenge individual classifications, yet the right to administer the plan and establish classifications ultimately rests with Management. The Union does not perceive the job evaluation plan as serving them any particular purpose. The Union representative acknowledged that it is a far more efficient means of establishing wage differentials than negotiating each classification individually, *provided* that the plan is administered fairly. The Union has had concerns with, what they perceive to be the subjectivity of the plan. These concerns culminated in the negotiated establishment of the review committee. Even though the committee has not actually facilitated any changes to the plan as yet, the Union appears to be relatively satisfied with the "possibility" of change the joint review committee appears to offer.

Both parties agree that the job evaluation plan is a less adversarial process than many in labour relations. Management and the Union have a common interest in achieving "true" and accurate wage differentials, therefore, job evaluation is not, inherently, a controversial process. The Company representative suggests that, because management and labour's goals are frequently mutually exclusive, much opportunity exists for confrontation, in other areas. Certainly, BC Tel's labour relations confrontations have been a common subject of media coverage. However, despite this notoriety, the Company representative maintains that the relationship during the past five years has been excellent, with the development of effective,
open lines of communication. He cites, as examples, the fact that three Collective Agreements have been signed, in succession, without a work stoppage and that BC Tel and TWU have, recently worked cooperatively to facilitate a massive relocation of employees as a result of branch closures. The Union representative, although not in open contradiction of Management, was more ambivalent in his assessment of the industrial relations climate.

Dealings with respect to the job evaluation plan appear to parallel the general industrial relations milieu, insofar as management has maintained firm control over the plan. However, a channel of communication has been established, through the joint review committee, to address the Union's concerns with the plan. The results of the joint review committee's efforts will be instrumental in determining whether the job evaluation plan can achieve mutual acceptance. At this point in time, the job evaluation plan is effective in terms of accomplishing Management's objectives, but is not perceived by the Union to meet their standards of objectivity and fairness. Neither the Union nor Management could speculate on the degree of employee acceptance of the job evaluation plan. However, the Company representative maintains that employee acceptance is not a pertinent standard of plan effectiveness as a job measurement tool.
CHAPTER IV
UNIVERSITY OF BRITISH COLUMBIA
and
CANADIAN UNIVERSITY EMPLOYEES
JOB EVALUATION PLAN

The Canadian University Employees (CUE) is the bargaining agent for approximately thirteen hundred full- and part-time clerical and library employees, within approximately fifty separate classifications, of the University of British Columbia (UBC). CUE has a relatively homogeneous occupational composition, representing a breadth of clerical functions supporting the instructional, administrative and library services of the university. The largest classes of employees are the Secretary 2, 3 and 4's, the Clerk 1, 2 and 3's and the Library Assistants. In comparison with these main classes, the remaining classes drop significantly in size. This group of employees became unionized approximately twelve years ago as the Association of University and College Employees (AUCE). The Union's name was changed to CUE, in 1985, reflecting a recent affiliation with the Canadian Union of Public Employees.

Clerical employees on campus initially organized to counteract what was perceived to be management mistreatment of and disrespect for their employees. Amongst other concerns, employees believed there was inequitable access to employee benefits and working conditions, favouring some departments and disadvantaging others. Consequently, the Union was formed in an environment of mistrust and hostility.

At the time of Union certification, the University was applying a grade definition (classification) system of job evaluation which had been in effect since the late 1950s. The University representative speculated that the system evolved from a form of ranking. AUCE had major concerns regarding the administration of the plan, believing its application, like so many other management functions, was selective and inequitable. At the time of
certification, the University approached AUCE with a proposal for joint administration of the existing job evaluation plan. Joint administration offered the opportunity for alleviating the Union's concerns with the secrecy and misapplication of the plan. Although initially interested in joint administration, AUCE subsequently chose to maintain the right to challenge a unilaterally administered plan. The University representative's conjecture on the Union's change of position is that, with Union members on the evaluation committee, it would be difficult to defend the employee's position in the event of employee dissatisfaction, e.g., an employee initiated grievance. The current Union Coordinator concurs, believing that union representation on a joint committee implies complicity with what is, ostensibly, a management decision. Therefore, by maintaining the right to challenge management decisions, the Union best protects its members.

Thus, in 1974, when the first AUCE/UBC Collective Agreement was signed, it contained the terms of reference for the application of the unilaterally administered job evaluation plan. Although the terms of reference have been formalized by inclusion in the Collective Agreement, the job evaluation plan itself has not changed significantly since its inception nearly thirty years ago.

Article 31 (Job Descriptions, Job Evaluation and Reclassification) of the Collective Agreement provides that implementation of revised or new job descriptions is contingent upon Union acceptance. However, the Union must provide notice of objection within sixty days, or acceptance is assumed. This article dictates acceptable and unacceptable job description phraseology as well as the salary treatment (i.e., retroactivity) in the event of a reclassification or misclassification. There are no salary treatment provisions, such as red-circling, in the event of a downward reclassification. The general practice, however, is to adjust the value downward at the time the position is vacated.

Additionally, the Collective Agreement stipulates the reclassification procedure but it does not dictate the evaluation method. The evaluation process was developed and is
coordinated by UBC's Personnel Services (Compensation Division), comprised of three full-time employees (a manager and two analysts). A job classification review can be initiated by the employee, the Union or the Department Head but no more frequently than every six months. Once a review request is launched, the job analysis is performed by one of the analysts using information gathered from a questionnaire completed by the employees, supervisors and/or Department Head, as well as that gleaned from an "on-site" audit, including interviews with the interested parties. A position description is drafted by the analyst and forwarded to the department for feedback. The Analyst will then qualitatively evaluates the position on the basis of the approved position description, using a grade definition method.

The standards of evaluation used include the following factors; complexity, accuracy/accountability, judgments/decision, supervision given, contacts and job requirements. These factors are not formally weighted and, by virtue of the "whole job" approach of the classification methodology (i.e., considering the value of the whole job in comparison with the value of other whole jobs to establish an order of jobs) varies in relative importance depending on the particular job being evaluated. The position is analyzed and compared against other positions which the analyst sees to be similar in scope, level of responsibility and complexity. A job evaluation glossary of terminology, a departmental document describing the assessment criteria and other job descriptions are the only tools used in the evaluation process. A summary of the analysis and the Standard Job Description are forwarded to the Reference Committee for consideration.

The Reference Committee, for all intents and purposes, is the decision-making body of the evaluation plan. The committee is composed of five non-bargaining unit first-line supervisors, Department Heads and/or faculty members. Personnel Services chooses the members, whose participation on the committee is voluntary. They are selected on the basis of the kinds of positions they supervise, their breadth of job knowledge and their apparent
analytical ability. The goal in the committee member selection is to obtain strong cross-sectional representation with an extensive, composite job knowledge. The current committee members include, for example, the Chief Accountant, a member of the Faculty of Medicine and an Administrative Assistant from Zoology. Committee membership, which changes through attrition, is deemed to be very stable. The current complement of members has been together about two years, enhancing their familiarization with the plan and, ultimately, the continuity of plan application. New committee members are given a brief orientation to the job evaluation process, job standards, etc., but training is primarily "on-the-job".

The Reference Committee meets regularly, monthly for a half a day to deal with the job reclassification review submissions made by the analysts. Upon consideration of this material, they will make recommendations regarding the appropriate classification and placement, within the pre-existing eleven pay-grade wage scale, of the position in question. Recommendations are submitted to the Director of Personnel Services, who has final approval over them.

Until recently, when a reclassification involved an upwards revaluation, the increase to the wage bill was absorbed by a special Personnel Services fund for one year before it was transferred to the Department's budget. However, now that Personnel Services no longer has a budget for reclassification wage increases, the department is responsible for the wage increase from the time of the revaluation. Therefore, the Department Head will have the choice of accepting the reclassification or adjusting the duties to within the current classification. If the funding for the reclassification is approved (there has been only one incident of its not being approved by the Department), the increase will be awarded in accordance with the Collective Agreement, which stipulates the conditions for retroactivity. If the reclassification is not approved by the Department, the Department is still responsible for the retroactive payment plus payment for the period up until adjustments are made to the duties.

If the employee, Department or Union is dissatisfied with the classification decision,
they each have the right to grieve the decision, beginning with Step 3 of the procedure. Although not provided for in the Collective Agreement, there exists an Appeal Committee which the aggrieved parties tend to approach first, before launching a grievance. The Appeal Committee is composed of UBC employees senior to those on the Reference Committee, chosen on the same basis as Reference Committee members. The Appeal Committee meets on an ad hoc basis, an average of twice a year, to hear appeals. The appealant can present his/her case in person or have a Union representative present on his/her behalf. The Analyst acts as resource person in attendance at the meeting. The Appeal Committee makes recommendations to the Director of Personnel Services who, again, has final approval of its recommendations. If, after pursuing an appeal through the Appeal Committee, the employee or Union is dissatisfied, the grievance procedure can be followed. The Collective Agreement, by Letter of Understanding, provides for three arbitrators named by the Minister of Labour to serve in reclassification/misclassification grievances. However, the Union does not support this arrangement, thus deletion from the Collective Agreement is being contemplated. An estimated 5 percent of job evaluation decisions are appealed and an even smaller percentage goes to arbitration (approximately eight cases in the last twelve years). For example, in 1985, thirty-five reclassification requests were initiated, nineteen of which resulted in an upwards reclassification. Only one appeal was launched, which was unsuccessful, and was not pursued through grievance. To date, all arbitration decisions have been in the University's favour.

The employee is advised of and has input into the position description drafted by the Analyst. He/she will be advised of the disposition of the review request and, if the reclassification is not recommended, notified of the reasons for denying the request. The Union receives copies of this correspondence. The rationale behind an appeal disposition is only accessible to the appealant if the case goes to arbitration.

There is no formal review or audit of the job classification structure built into the
plan. The University maintains that the job standards are being reviewed continuously and updated when necessary (e.g., the 1982 Salary Equity Program, discussed later). This ongoing review is perceived to maintain accurate wage differentials and internal equity. External parity is checked in preparation for negotiations, when the UBC salaries of benchmark positions are compared against a market survey of twelve to thirteen organizations of similar composition. Therefore, adjustments to the wage schedule, intended to achieve external parity, will be made through negotiations. However, isolated positions may be affected if the market values are not comparable to the University-determined internal value.

One example of this problem exists with Clinical Secretaries, who work within a medical milieu at the university. The focus of the UBC job evaluation plan is internal equity, therefore, the rates for these positions are determined relative to other secretarial positions within CUE. However, the rates for the Clinical Secretaries are depressed compared with the rates offered to clerical staff within the health industry, and consequently there is high turnover in these positions. Conversely, problems can arise when the rates are set exclusively by the market value, in the event the job is unique and without ready internal comparisons. For example, many years ago when establishing the value for Computer Operators, the University used market rates, which it had to offer to attract qualified operators. However, subsequently, the proliferation of trained Computer Operators has adjusted the market value downwards, although the University rates, once set, are not as readily adjusted. The vulnerability in using external comparisons for selective positions lies in the market rate variability to which the job evaluation plan may be unable to adjust immediately.

In the main, the occupational composite within CUE is relatively homogeneous so that, for the bargaining unit as a whole, maintaining parity with external clerical markets is not problematic. The rates offered by UBC for benchmark clerical positions are virtually on par with (unionized) market rates in Greater Vancouver. For example, the salary range for a
Secretary I at UBC is $1319 to $1468 per month, compared to market rates of $1103 to $1450 per month. ⁴¹

Changes to the wage structure to improve internal relativities is also a negotiable item. In 1982, for example, the University proposed a "Salary Equity Program" at the bargaining table. This proposal, which was eventually accepted by the Union, was aimed at rationalizing the pay structure by updating some of the classes believed to be obsolete and by creating additional classes (and pay grades) more sensitive to the distinctions between positions. Certain job families, mainly secretarial and library related, were perceived to be problematic, i.e., the classes were too broad and the Job Descriptions out of date. Approximately 50 percent of the jobs were reviewed, involving over five hundred employees, although only approximately 5 percent of the reviews actually resulted in an upwards reclassification. Many of the positions were simply updated and the paygrade revised according to a new eleven-step Pay Grade wage structure. A Letter of Understanding, negotiated at the time, guaranteed that employees would not be downgraded in classification as a result of the new Standard Job Descriptions arising from the Salary Equity Program. The University representative believes most of the wage structure and classification problems were resolved through this Program. However, one issue still remains where the University would like to create a Clerk Typist class that would perform a blend of duties currently performed either by a Clerk (which is a non-typing class) or a Secretary. Such a class would offer greater flexibility in organizing the work; however, to date, it does not have Union acceptance.

In addition to improving the wage structure through the Salary Equity Program, the University also endeavored to review and assess the word processing function which increasingly was becoming a task performed within a number of separate positions. Upon completion of the review, the University decided that utilizing a word processor while performing the usual range of duties of a class, does change the value of the position. If, however, the nature of the employee's task changes as a result of the implementation of a
word processing system, it may constitute a change in value. The Union's stance, on the other hand, was that word processing is an additional skill which should warrant additional remuneration. As a result of the 1982 review, the university established two new classifications, whose primary duties involved word processing, of Word Processing Operator and Word Processing Supervisor which were accepted by the Union, as part of the contract offer. Only six employees were classified as Word Processing Operators, a situation grieved by several Secretary 2's who believed they qualified for that classification. The Union proceeded to arbitration with what they believed to be the strongest of the twelve grievances. The arbitration award favoured the University, on the grounds that the University had been consistent in its interpretation and application of the jointly-negotiated Word Processing Operator standard. Another related issue was arbitrated, and the resulting consent award stipulated that the University was to devise new job standards for word processors. The new standards were eventually agreed upon, incorporating "automated office systems" and the subsequent skills required to operate them into the secretarial Standard Job Description. The new classification of "Word Processing Coordinator" distinguishes the position from that of a secretarial class by the inclusion of administrative duties, i.e., training, supervising, etc. The Union was not totally satisfied with the agreed upon standards, fearing they would impede current employees from successfully applying for transfers or promotions to jobs requiring word processing. The issue was resolved when the University agreed to provide word processing training to all those secretaries and clerks who are not proficient operators of an automated system. Certification of the training would be provided to all those who took the course. This certification could be produced to meet the word processing requirements when applying for vacancies for up to one year.

The University believes that its grade definition job evaluation plan has the necessary flexibility to accommodate technological change, insofar as it can initiate, at any time, changes to the job standards which reflect technological change. Such a change is not
automatic as the Collective Agreement stipulates that implementation of a new standard is conditional upon Union acceptance. The Union does not disagree that the plan itself is accommodating and flexible; however, because of the judgmental nature of the evaluation the Union and the University may not necessarily agree on the value of the new skills and duties arising from technological change. This difficulty is exemplified by the issue of the word processing operators. It took three years and two arbitrations to resolve the determination of the value of the impact of technological change on the positions within CUE. Nevertheless, the dispute resolution process has the flexibility to be innovative and constructive, leading to long-term improvements for both the University and the Union, as demonstrated in the agreed upon word processing training program. Therefore, when disputes can be resolved between the parties, it is potentially a highly flexible process. Furthermore, the occupational composition of CUE is primarily clerical, therefore, the nature of the work and the means of performing it is relatively static. Consequently, the demands on the job evaluation plan, in terms of accommodating to technological change and/or rapidly changing job functions, are minimal.

As demonstrated by the valuation of the Computer Operator class, there are circumstances in which the pay rates will be established on the basis of market rates. However, the Union is averse to the use of market values as pricing standards for CUE positions. As a "feminist union", the Union wants equal pay for work of equal value is a fundamental principle of the Union, in accordance with their perceived role. The Union believes that external labour markets still manifest discriminatory wage differentials; therefore, using them as a standard is seen to negate equal pay for work of equal value. Furthermore, because CUE encompasses a relatively homogeneous occupational group of "traditionally female jobs", internal comparisons will be of limited use in rectifying a societal undervaluing of these jobs. Instead, the Union would like to see "real value" assessed through a skill–by–skill comparison (e.g., point factor method) with other UBC (non–CUE)
positions. The grade definition plan, by virtue of being a "whole job" evaluation methodology, is not seen to facilitate the implementation of the equal pay for work of equal value principle.

CUE believes that another fundamental principle of the Union's—job security—is being weakened by the plan because of the current contract language regarding layoffs. The layoff procedure clause only provides for "involuntary transfer" laterally in the same classification, with no downward movement possible. Therefore, in the case of unique or narrow classifications, incumbents may have minimal seniority rights and job security. On the other hand, the existence of too broad of a classification, covering a diversity of positions, can also be problematic. For example, in the event of involuntary transfer, an incumbent of a class may not be qualified to perform the duties of a more specialized position within the same class. Accordingly, a Letter of Understanding was signed which provided for the joint identification of positions "whose qualification requirements differ from the norm of the classification." Those "specialized" positions identified would not be used for the placement of employees who are being involuntarily transferred.

Both the University and the Union take responsibility, in part, for the education of employees in the job evaluation plan. At the moment, the role of both parties is more reactive, insofar as the analysts and the Union will explain the plan process to those who have initiated job classification reviews. The Union keeps the membership abreast of the classification developments through a Newsletter report from the Job Evaluation Committee. The Job Evaluation Committee, as provided for in the Collective Agreement, is composed of Union members who meet on an ad hoc basis to deal with the University on job evaluation matters, such as the new Standard Job Descriptions. It is not a standing committee and the Union does not provide any formal training to committee members. Both the University and the Union feel that their respective information programs need improvement. The Union Coordinator believes a more proactive education process would encourage more reclassification
requests, which would be a means of achieving wage increases while under the Compensation Stabilization Program (CSP). There is no evidence, so far, that the CSP has precipitated an increase in the number of job classification review requests or reclassification disputes, within UBC. However, the Union Coordinator noted that, "perhaps it's not so surprising in light of the low success rate."42

The UBC job evaluation plan has never been formally assessed with respect to employee acceptability, either by the Union or the University. The University representative's philosophy is that the employee's perception of the plan as being fair is of paramount importance. He acknowledged that this criterion was difficult to measure; however, the informal feedback from employees has been positive. Furthermore, the fact that very few changes to the plan have been proposed for negotiations by the Union and the existence of, what the Union and Management perceive to be, the low grievance/arbitration rate are interpreted as more formal indicators of plan effectiveness.

This success is attributed, by the University representative, to the people administering the plan (i.e., the Reference Committee and the analysts). The Reference Committee, he conjectured, is perceived to be an independent, non-partisan body enhancing the credibility of the job classification decision. The University representative has confidence that the analysts and Reference Committee members have extensive job knowledge and a thorough understanding of the evaluation process. The two analysts, for example, are recruited with previous training and/or practical experience in job evaluation; they then receive at least one month University-specific training in the evaluation system, personnel and labour relations policy, etc. The familiarization period is estimated to be six months to a year, and the average tenure of an analyst is approximately three to four years. Therefore, the stability of the analysts' and the Reference Committee's tenure is perceived to enhance consistency and reliability of evaluation decisions.

Despite his overall satisfaction with the plan, the University representative believes one
difficulty of plan administration is the existence of a backlog of reviews which may prohibit reaching a reclassification decision within the eight-week timeframe stipulated in the Collective Agreement. In light of the contractual provisions, which set the date of the reclassification review request as the retroactive date of increase, the Union does not feel dilatoriness is an issue.

The Union is more ambivalent than the University with respect to the perceived effectiveness of the job evaluation plan. The Union representative acknowledges that the existing plan appears to be effectively maintaining internal equity. Furthermore, he recognizes that the low rate of appeals, grievances and arbitrations speaks favorably for the plan. However, he maintains that those statistics should be qualified in that it appears that members only initiate reclassification requests if they are completely legitimate and they have full support of their Department Heads, whose support, he thinks, is influential in the decision outcome. The University representative maintains, however, that the Department Head's involvement in the evaluation process is merely to verify job analysis information and the Standard Job Description. Therefore, his/her position on the validity of the reclassification request is not pertinent to the evaluation process. For example, he notes that approximately 80 percent of the requests are supported by the respective Department Heads, although, the percent of requests actually granted is not nearly that high (e.g., in 1985, only 54 percent of the requests resulted in an upwards revaluation).

Regardless, the Union representative maintains that with greater member education of the reclassification avenue, many more contentious requests will be initiated leading to a higher occurrence of disputes and dispute resolutions (i.e., grievances, appeals, arbitrations). Despite his anticipation of increased conflict in the future, the Union's experience with the analysts and the Reference Committee, to date, "has not been negative." He does not believe that the Appeal Committee works as effectively, however, arguing that it is not adequately informed to make decisions and thus merely becomes a "rubber stamp" in the process.
Despite the perceived weakness of the Appeal Committee, he acknowledges that the internal wage relationships are reasonably accurate as maintained by the plan.

The Union Coordinator suggests that the contract language respecting job evaluation places the Union in a strong position to monitor and control the classification system.

Clause 31.01 (Job Descriptions) reads as follows:

The current approved Job Descriptions shall be the recognized standard description of each classification. Revised or new Job Descriptions and/or Pay Grades will not be implemented until accepted by the Union.43

Therefore, in addition to having the right to challenge the University's decisions on the valuation of individual positions, the plan standards themselves cannot be changed without Union concurrence. This provision ensures the Union's active involvement in the plan upkeep and administration, without its becoming an "accomplice" in joint decision-making. The University representative does not think this provision constrains management's right to administer the plan. Rather, because the Union tacitly approves all classifications, by defaulting objections within the stipulated time period, it will have difficulty contesting the classification at a future point. It appears, therefore, that the terms of reference establish a balance of power and involvement satisfactory to both parties.

One of the Union's primary concerns with the plan is the perceived inability to implement "equal pay for work of equal value" using the existing methodology. The grade definition process is seen to be too subjective and thus, vulnerable to traditional bias. The Union representative believes that comparable worth is more accurately measured by a skill-by-skill or factorial process, as opposed to the "whole job" approach to the grade definition plan. Furthermore, he does not agree that adequate benchmarks exist, thus precluding meaningful comparison to positions outside the bargaining unit.

As mentioned earlier, job security is also of primary importance to the Union, yet it is not seen to be well protected under the existing evaluation plan. The Union representative recognizes, however, that this failing is not so much a weakness of the plan itself as it is a
function of the contract language respecting layoffs, which, presumably could be strengthened through negotiations. Where difficulties have arisen when applying the language within the parameters of the classification system, suitable accommodating arrangements have been negotiated.

Despite the Union's concerns with the inability of the plan to adequately measure equal pay for work of equal value and with the subjective nature of the grade definition methodology, no active steps have been taken to instigate a change to the plan itself. The Union representative did not have a plan methodology to suggest as a more acceptable alternative, rather, the Union is endeavoring to put pressure on the existing plan through the pursuit of individual reclassification disputes.

The Union's assessment of the job evaluation plan is not inconsistent with the University's view of its effectiveness. The University's objective of the plan is to provide a fair method of measuring and maintaining internal wage relativities. The University representative is satisfied that the plan meets that criterion and, as well, has employee acceptance. Although both parties consider the dispute rate low, some problems are indicated when one looks at the dispute rate of another UBC bargaining unit, CUPE, which has had only one reclassification arbitration in a twelve-year period. The University representative speculated that the air of hostility and mistrust under which the Union was formed has lingered over the years, precipitating Union challenges of all management functions, including job evaluation. He believes, however, that the arbitration awards, which have always supported the University's evaluations, may have gradually lent credibility to the plan. Additionally, the level of industrial relations animosity is perceived to have been dissipating over the years. Both these factors are seen, by the University representative, to have had a positive effect on dealings with the Union regarding the plan.

The University representative shares, with the Union, a concern with the issue of achieving equal pay for work of equal value. Although there is no immediate pressure, from
either the Union or provincial legislation, to address this issue within the context of the job evaluation plan, he is mindful that adjustments to the plan may have to be made in the future.

In the meantime, the job evaluation plan appears to have sufficient CUE and University acceptance to warrant its continuation. The plan appears to have withstood the pressures of a tumultuous industrial relations environment while the need to accommodate comparable worth has not been strong enough, to date, to induce changes to it.
CHAPTER V

BC HYDRO AND POWER AUTHORITY

and

OFFICE AND TECHNICAL EMPLOYEES' UNION

JOB EVALUATION PLAN

BC Hydro and Power Authority (BC Hydro) is a Crown Corporation utility company which employs thirty-five hundred members of the Office and Technical Employees' Union (OTEU). The occupational composition of BC Hydro's work force is diverse: an estimated fourteen different classes ranging from file clerks to engineers to economists. The largest job group is that of the Stenographer Clerk, but as the numbers suggest, there are numerous single position groups.

The existing BC Hydro organization is a result of the 1946 amalgamation of BC Electric and BC Power Commission. At the time of the merger, the decision was made to maintain the Stevenson Kellogg point factor evaluation plan applied by BC Electric, and to abandon the classification system utilized by BC Power Commission. The rationale for the choice is unknown, although the Stevenson Kellogg (now Thorne Stevenson Kellogg) plan is well established and is, currently applied in a number of organizations throughout British Columbia (including two other OTEU bargaining units). Over the years, OTEU became increasingly dissatisfied with the administration of the plan. They believed that the value standards were not applied consistently and the plan was being manipulated to the benefit of select departments. This mistrust was compounded by the lack of information accessibility and the secretive nature of the plan. There were no provisions for a regular audit of the plan, so that inaccuracies in the system were compounded over the years. The appeal process, which was rooted in the grievance procedure, was expensive and time-consuming for both parties. Even though the plan was unilaterally developed and administered by management, it did not
have line management support, as this level of management shared the Union's dissatisfaction with the poor administration of the plan and wanted more input into the evaluation process. OTEU's dissatisfaction with the plan culminated in 1974 when it became a strike issue during negotiations. Management acquiesced to Union demands, and provisions for a joint review of the job evaluation plan were included in the Collective Agreement.

As a result, a task force consisting of three line management and three Union representatives and led by one consultant, was established. The task force initiated a "needs analysis" to diagnose the failures of the old plan and establish the objectives of the new plan. OTEU believed the Experience factor was outdated and the duality of the combined Complexity/Judgment factor was problematic. Alternate evaluation methodologies were considered; however, other than OTEU's concern with those two specific factors, there appeared to be no insurmountable objections to the point factor method itself. Therefore, the task force agreed to maintain a point factor evaluation approach supplemented by the introduction of a new in-house appeal system to circumvent the involvement and cost of arbitration. Once the task force had agreed on all the factors and developed the new plan, it was tested, to the satisfaction of the task force, on a sampling of jobs. In 1978, a management consultant, with a force of approximately twenty employees, was contracted by BC Hydro to convert all of the existing classifications to the new plan, as well as to "fine-tune" the plan through application. The contract employees were provided with a four-day classroom training session and a week long practical session working with an experienced analyst, prior to being launched into the project. The Stevenson Kellogg plan was still actually in effect throughout the conversion process, although all reclassification requests were frozen. Upon completion of the conversion process, in 1980, the results of the new plan were assessed in terms of party acceptance. Prior to ratifying the new plan, certain administrative issues had to be clarified, e.g., the effective date of the plan, provisions in the event of a downward classification, retroactive date of reclassification, etc.
Finally, the new plan was ratified by both parties, the task force reported out, and a Job Evaluation Supervisor was hired by BC Hydro to implement the new plan. Implementation occurred by Division, commencing with a two-hour information meeting for managers and supervisors, within each of the nineteen divisions, explaining the new plan. The Job Descriptions of their subordinates were distributed to the supervisors and they had the responsibility of notifying the analysts of any discrepancies or inaccuracies. The analysts were concurrently rectifying any outstanding anomalies resulting from the conversion process. The implementation phase was approximately one year in length. The joint review, launched in 1974, experienced fruition in January, 1982 with the formal implementation of the new bilaterally developed plan.

The pay structure in effect under the old plan was not altered when the new plan was implemented; therefore, the new job grouping point ranges correspond to the previous pay schedule, avoiding a total pay restructuring. However, as a result of the evaluation review, approximately 27 percent of the positions were revalued upwards at a cost of close to two million dollars. Furthermore, provisions for "blue-circling" were negotiated into the Collective Agreement which ensured that an incumbent, in the event that his/her position has been downgraded through the implementation process, would continue to be remunerated at the rate of his/her classification (and would receive all across-the-board salary increases) until which time he/she vacates the position. At the time the agreement with respect to blue-circling was made, management anticipated a high turnover amongst blue-circled employees. This did not happen and, although specific figures and cost analysis are not available, management believes blue-circling has become a costly adjunct to the plan implementation.

The task force recommendations for the new Job Evaluation Plan are included in Article 2 (Job Evaluation) of the BC Hydro/OTEU Collective Agreement. These provisions dictate that "This plan shall be the sole determinant of job groupings for employees covered by this
Agreement except as outlined in Article 2.09. The contractual terms of reference provide for, among other conditions, Union access to all current job descriptions and job descriptions for newly created jobs. The salary treatment in the event of a change in evaluation of jobs is clarified, providing for retroactivity in the event of an upgrading and "red-circling" in the event of downgrading after implementation (i.e., the incumbent would continue to receive the salary of the class prior to downgrading, until which time as the new class salary is raised to a level above his/her salary). The Steering Committee and the Appeals Committee are defined and their jurisdiction outlined, along with provisions for shared costs of the Appeals Committee Chairman, his secretary and incidental expenses. Finally, the conditions governing the exclusions of individual jobs from the plan are outlined as well. All these components of the plan are described in greater detail later in the chapter.

Although OTEU was integrally involved in the joint development of the plan, it chose to have management unilaterally administer the plan once it was operational. A primary reason for this decision was the cost factor of financing joint administration. Job evaluation is seen to be a management tool, therefore, it is more cost efficient for the Union to become involved only if an evaluation is contested. Accordingly, the Union does maintain the right to challenge management decisions and the latitude for challenge is comprehensively outlined in the Job Evaluation Plan Manual. Furthermore, in the event an evaluation decision is contested, the issue will be brought before a joint Appeals Committee. Therefore, although ostensibly the plan is unilaterally administered, the terms of reference maximize Union involvement in the evaluation process and ensure the Union a strong position from which to challenge the plan.

The BC Hydro/OTEU Job Evaluation System Plan Manual comprehensively outlines the general rules of evaluation as well as the methodology itself. Although not included in the Collective Agreement, the seventy-six page manual is binding. The point factor system applied involves a complex measurement process of the following factors: Formal education,
previous practical experience, knowledge acquired on the job, analysis and creativity, judgment, decisions, communication, environment, hazards and work leadership. The manual includes a definition of each factor, general rules governing the measurement of the factor and/or application instructions to assist in the measurement process. For example, the application instructions for the Analysis factor are as follows:

Analysis involves such activities as researching and examining information to gain an understanding of work problems and situations and may involve checking the accuracy or validity of data. Examples of activities in which analysis may be required include:

(a) researching to assemble and determine relationships between data;
(b) researching to define objectives or determine needs of users;
(c) checking of data for accuracy or completeness;
(d) classifying or organizing data;
(e) inspecting;
(f) monitoring. \(^{45}\)

Each factor is measured in terms of "levels" which indicate the degree of difficulty or magnitude of difference within each factor. Definitions of each level are provided in the manual as the standard of measurement. For example, the factor levels of Analysis are defined as follows:

1. Data, instructions and references are familiar and easily understood. (15 points)
2. Data, instructions and references require some interpretation because the significance, meaning or relationship of the information utilized may not be obvious. (30 points)
3. Some variables and/or unknowns exist in data, instructions and references available requiring the interpretations and adaptations of existing data, instructions and references. (45 points)
4. Many variables and/or unknowns existing in data, instructions and references available requiring the interpretations and adaptations of existing data, instructions and references and the developments of new data, instructions and references. (60 points)\(^{46}\)

Therefore, in accordance with the definitions provided, point values are assigned on the basis
of a level designation. The factor values of Decisions, Communications and Working Conditions are determined by a factorial matrix. For example, the Decision Matrix consists of the level: "effect of the majority of the decisions which could result in a contribution or loss" and the degree: "number of decisions". The point values for all factors, except Work Leadership, are totalled and this total is used to slot the position into one of the fourteen wage groups (spanning a range of point values from 128 to 881) corresponding to the point total. The Work Leadership factor is evaluated over and above the point total. A position must include seven supervisory functions, defined in the manual, to receive value for Work Leadership. If the criterion is met an additional paygrade is attached to the position.

Several different parties are involved in the job evaluation plan procedures and their specific roles are also outlined in the Plan Manual. One or more Job Evaluation Officers within OTEU can act as an incumbent's advocate in the review process, and can also recommend changes to the plan or the administration of the plan. (In practice, two staff representatives of OTEU are assigned, although, not exclusively, to monitor the plan.) There are thirty-four Contact Supervisors (one or two per Division) who are line managers appointed by the Division Managers, to act as advocates of the Division. The Contact Supervisor advises the Division Management on the application of the plan, and liaises between the Division and the Job Evaluation Section, OTEU, the appeal committee, etc. Furthermore, the Contact Supervisor is responsible for monitoring the job evaluation activity to identify and resolve problems and make recommendations for change. The Job Evaluation Section is the body actually responsible for the job analysis and evaluation process as well as for maintaining historical records of all jobs.

The Appeal Committee is referred to as JEMAC (Job Evaluation Monitoring and Appeals Committee) and consists of a five person panel, comprised of two OTEU members and two management representatives, selected by the independent standing chairperson from a pool of four OTEU and four BC Hydro representatives. JEMAC receives appeals from employees,
supervisors and/or OTEU regarding the interpretation and application of the plan, description and evaluation of a job, retroactivity of payment, etc. JEMAC may also perform random checks of jobs being evaluated by the Job Evaluation Section to ensure that the plan is being interpreted and applied consistently. Recommendations for plan improvement can be submitted to JEMAC by Management and OTEU, and JEMAC, in turn, may make recommendations to the Steering Committee. The Steering Committee, which consists of the President of OTEU and the Manager of the Labour Relations Division of BC Hydro, is the only party authorized to change the plan or recommend to their principles, changes to the terms of reference as stipulated in the Collective Agreement. In essence, the Steering Committee is to act as a "safety valve" to the plan, resolving issues before they undermine the operation of the plan and providing flexibility and adaptability to plan administration. In practice, the Steering Committee has only been activated once, to approve and implement changes to expedite the appeal preparation and investigation process.

The incumbent, the supervisor and/or manager responsible for the job, the OTEU Job Evaluation Officer and the Job Evaluation Supervisor are each entitled to initiate a job review request, in the event the duties or work methods have changed, the Department has been reorganized, a new job has been created, etc. If a request has been launched by the incumbent, the supervisor must approve or reject the request within fourteen days of receiving it. If the Supervisor approves the request (or if OTEU has launched the request directly), it is forwarded to the Job Evaluation Section for the Job Evaluation Supervisor's acceptance or rejection. This disposition must be reached within five working days. Once the request is accepted, a job analyst is assigned to follow an eight-step process of investigation, write-up and evaluation. The investigation, or analysis step, will involve research into the job and job group as well as interviews with all involved parties. The interview content is determined by the analyst since no standard analysis format is used. All reviews must be completed by the Job Evaluation Section within forty-two working days of
receipt of the request. The Final Job Description and Evaluation is then forwarded to the incumbent, Supervisor/Manager, Contact Supervisor, Personnel Officer, and OTEU Job Evaluation Officer. A number of issues throughout the review can be appealed to JEMAC by the incumbent, the supervisor or the OTEU Job Evaluation Officer within stipulated periods of time. Specific appealable issues are: failure by any of the parties to meet the System deadlines, rejection of a Job Evaluation Review request by either the Line Supervisor or the Job Evaluation Supervisor, and disagreement with the content of the Job Description, including the work circumstances, the factor level assigned, the effective date and the job title.

The JEMAC Chairperson is responsible for scheduling hearings, which occur once a month, and selecting the hearing panel. Party representatives are required to submit documentation, including recommendations and reasons, to JEMAC at least one week prior to the hearing. This material is reviewed by the panel and a vote on the recommendations is taken after the formal hearing presentation and discussion. If the vote is tied, the chairperson shall cast the deciding vote. The JEMAC decision is final and binding. It is the assumption, within the plan that cases going to appeal are exceptional and unique and that, therefore, the JEMAC decision should not be considered precedential. Accordingly, although all information regarding the evaluation process, to this point, is available to all parties, the reasons for the appeal decision and the specific outcome of the vote are not released.

Provisions outlining the preparation for an appeal hearing are contained in the Plan Manual and facilitate the interested parties convening in a manner akin to a "pre-appeal" meeting. During this step, the parties clarify the facts and evidence to be presented so that JEMAC is only adjudicating questions of interpretation. It is estimated that approximately 70 percent of appeals are resolved at this stage, either by representative (OTEU or Contact Supervisor) recommendation of withdrawal to his/her client or by changes to the evaluation by the job analyst. Despite the effectiveness of this particular step, a significant number of
appeals resulting from the implementation of the plan four years ago remain outstanding. Approximately 5 percent (one hundred and fifty) of the implementation evaluations were appealed, and of these, a significant percentage has yet to be resolved. Although scheduling more appeal hearings was considered, in order to alleviate the backlog, the manpower was not available within the Job Evaluation Section to adequately prepare for more hearings. In the meantime, the JEMAC Chairman, whose function is similar to that of an outside arbitrator, is currently being paid a full salary, the cost of which is shared by the Union and Management, until the backlog of appeals is eliminated.

In addition to individually initiated Job Review requests, the Plan Manual provides for a three-year cyclical review of every job to ensure that all Job Descriptions and Evaluations are current. The audit process was to commence in 1985; however, eliminating the backlog of appeals is the first priority so that the review starting date has been postponed indefinitely.

At the time the plan was under review, the task force recognized the need for an evaluation methodology capable of valuing the extreme diversity of occupations found within OTEU. The point factor methodology was believed to be most suitable, however, certain limitations existed. These limitations were addressed by the inclusion of an "exclusion" provision for those positions whose unique factors cannot accurately and effectively be evaluated using the existing plan. Generally, these positions are characterized by being outside the clerical or technical occupational ilk, e.g., cafeteria workers, security guards and surveying crews. Currently, there are approximately thirty-five jobs excluded from the plan. Where OTEU and Management agree that a position is to be excluded from the plan, a salary will be negotiated on the basis of external parity. If the two parties cannot agree to the exclusion of a position and/or the salary, the issue is resolved by the JEMAC Chairperson.

Consideration of external parity is not incorporated into the job evaluation plan process; rather, the plan focuses on measuring internal relativities only. Wage surveys are utilized
for external comparisons and, if necessary, adjustments for external parity of salaries will be achieved through negotiations. Hydro's salaries, generally, remain well above (unionized) market rates for clerical positions. For example, a Clerk Typist within Hydro receives a salary ranging from $1472 to $1765 per month, compared to the market rates of $1103 to $1450 per month.47 As a result, external market rates will not adversely effect the maintenance of internal equity.

The wage survey information, used for negotiations, is not collected or utilized by the Job Evaluation Section. Similarly, because the plan was specifically designed for the exclusive purpose of measuring job value, the information gathered through the job analysis process is generally not utilized for any other purpose. For example, a summary of position information developed during the evaluation may be utilized as recommended wording for a job vacancy posting, although the supervisor is free to stipulate "desirable qualifications" in addition to those recognized through evaluation. The Evaluation Section may be consulted in the event of Department or Division restructuring, although their involvement is not formally required. The right and responsibility to delegate and organize work rests squarely with the supervisor who must ensure, in the process, that the classifications of his/her staff are appropriate.

Although job evaluation is regarded as a unique function, a number of personnel/labour relations functions are entwined with the job evaluation system. For example, job groupings are established through job evaluation, whereas the salary scales, within which the groupings fall, are a separate negotiated item. Perhaps the most influential connection, however, is that of the role of the Job Evaluation Plan in the "bumping" procedure. Bumping can occur in the event a senior employee is laid-off and/or is displaced as a result of automation, new equipment or procedures, etc. An employee may bump an incumbent with less seniority but only within the employee's current Division (or, if that is infeasible, then the least senior incumbent within another Division) and, in accordance with the following stipulations,
included in Article 8 (Layoffs and Recall - Regular Employees) and Article 9 (Automation and New Procedures):

...the employee may bump...

a. in the same job, or;

b. in a previously permanently held job, or a job derived from it as determined through Hydro's Job Evaluation historical records, or;

c. in a job at a lower level not previously permanently held, provided the job is part of a "job hierarchy", as determined by Hydro's Job Evaluation Department, and provided the employee is currently employed within the "job hierarchy". 48

These Articles demand thorough historical record-keeping on the part of the Job Evaluation Department. More importantly, however, these provisions applied within the current multi-job and job hierarchy classification structure, are restricting and do not offer much job protection for employees within the numerous, single-incumbent job groupings. A Union representative, while recognizing the problems with the bumping provision, does not believe it is a weakness of the job evaluation plan and resultant multi-classifications. Rather, she sees it as a problem of the contract language dictating bumping, which, she was confident, could be remedied through negotiations. Even though one would reasonably assume that the myriad of classifications (estimates of the numbers range from twelve-hundred to sixteen hundred--neither party has done a count subsequent to the period of layoffs and position elimination) would be problematic in a variety of human resources situations, neither party perceives the classification schedule to be particularly unwieldy.

A Memorandum of Understanding provides for the assimilation of the new plan into the old, in the situation where progressions of jobs, or job hierarchies, were compressed into one job grouping. Therefore, rather than gaining experience and training through promotions within a series of separate and distinct jobs, a "Training Situation" has been created. In this circumstance, minor differences in duties, responsibilities, etc., which warranted separate job descriptions under the old plan, may not be recognized under the new plan. Rather, a job
description describing the "end" job (i.e., the job which encompasses the full range of duties and responsibilities) will be produced, by the Job Evaluation Department, to cover all jobs in the multi-level structure. The training schedule is determined in accordance with the analyst's assessment of the time required to obtain the skill and knowledge and with the Previous Practical Experience factor of the "end" job. Therefore, selection for such positions will be based on the assessment of the applicant's ability to perform the "end" job. The successful candidate will then progress through a training program, on a pre-determined time schedule, before actually achieving the level of skill and ability required for the particular job group the employee occupies. This provision is an effective means of accommodating the need for fewer job groupings without losing sensitivity to particular skill and training requirements of the job and the motivational potential of promotion/development paths within jobs.

The BC Hydro/OTEU Job Evaluation Plan utilizes a highly technical and complex methodology. However, the education programs, or lack thereof, have not facilitated employee and management understanding of the plan. During the implementation phase, supervisory and management staff were provided with an introduction to the plan; however, this has not been followed up in any formal manner, because of department budget constraints. OTEU assumes responsibility for educating its membership, although actual training programs, three to four days in length, have been limited to shop stewards and JEMAC members only. Providing this level of training to all members is logistically impossible.

The job analyst will explain the evaluation process to those parties involved in a review, and thus they maintain a key role in promoting a better understanding of the system. The importance of these positions was recognized by Management during the implementation phase, in particular. At that time, the Job Evaluation Department had grown significantly, from seven employees covering all employee groups to an assignment of eight analysts for the
OTEU plan alone. Because of the technical specialization required, these positions were isolated classifications and did not fall within a natural career path within the Human Resources Division. Recruiting analysts with strong technical expertise was a priority because of the "tripartite" nature of the system, described as such because the analysts are viewed as independent third parties, not aligned with Management or the Union. Therefore, analysts had to be technically capable of performing job evaluation and defending the results, in the event of an appeal. Establishing credibility and accountability was particularly important in light of the openness of the system.

However, results from a 1984 OTEU employee survey suggest that, in fact, analyst credibility is tenuous. Fifty percent of the respondents were dissatisfied with the job evaluation plan, citing slowness of the process, department/management interference with the plan and the "approach" of the analysts as the main concerns. This survey reflects a 35 percent drop in employee acceptance since the ratification of the plan in 1982. The "approach" of the analysts was characterized as the analysts indicating that they had an understanding of the job in the analysis interview, while producing a job description and valuation incompatible with the employee's view of the job. Conversely, the analysts' concern is that openness of the plan is not compatible with the complexity of it. Therefore, while most employees have had exposure to the plan, they have not had sufficient training in its mechanisms to readily understand the evaluation results.

Although employee acceptance of the plan appears to be marginal the Union representative believes the plan is working "as best as can be expected". At the time OTEU incited the job evaluation review task force, these specific criteria for the new plan were stipulated: that the plan be totally open, easily understood and readily appealable. Although he recognizes that the plan is technically complex, the Union representative believes the lack of employee understanding is a weakness of the education program and not the plan per se. He considers that the criteria of openness and appealability have been met, and that the
level of information accessibility and the comprehensive, in-house appeal system are the strengths of the plan. Therefore, the job evaluation plan has achieved the goals OTEU established, in reaction to the old plan, in 1974.

Another Union representative points out that the job evaluation plan has been effective in facilitating equal pay for work of equal value. It is her belief that the systemic manipulation occurring in the plan administration prior to 1974 was particularly discriminatory with respect to traditional "female" jobs. Although pursuing the principle of comparable worth was not a Union objective at the time, the task force was struck (the task force was all male), the plan, by virtue of the factorial methodology and more consistent administration, has rectified much of the previous discriminatory differentials. Comparable worth has subsequently become more of a priority within OTEU, so that recent negotiations have aimed at rationalizing the pay structure to increase the minimum wage. Compressing the wage scale and adjusting upwards the lower level jobs, while not achieving "true" equal pay for work of equal value, benefits those in the traditional female jobs which tend to be at the lower level of the scale.

In contrast to the definitive goals OTEU held through the development phase, there is no evidence that Hydro had any clear goals or objectives when embarking on the immense project of implementing a new job evaluation plan. Rather, both Hydro and Union representatives stated that Management's position was one of "acquiescence" to what was becoming a very contentious issue in negotiations. If Management's goal was to alleviate labour unrest through the job evaluation plan, it may have been successful initially. The Hydro representative suggested that the planning and development phase was perceived to be a positive step towards rectifying the job evaluation problem and thus enhanced the industrial relations climate during that period. Subsequently, however, employee disappointment with the actual implementation of the plan, he believes, has created another channel for hostilities. The hostilities have not arisen over the plan per se, but over the individual
evaluations. Both the Hydro and Union representatives note that the administration of the job evaluation plan is less adversarial than that of other personnel/labour relations functions and that the job evaluation plan is the last surviving jointly developed venture. The job evaluation plan, it would appear, has weathered some turbulence in the industrial relations climate.

Nevertheless, Management has some serious concerns with the effectiveness of the plan. Unlike the Union, which had clearly articulated goals which it met with the new plan, Hydro’s stance appears to have been simply reactive. Therefore, after an eight-year development period and barely four years of actual implementation, Management is realizing some fundamental difficulties with the job evaluation plan. One of the primary concerns is with the cost of the administration of the plan, estimated at one million dollars per year. When the plan was initially proposed, BC Hydro was in a strong growth period. However, implementation came at the tail end of this period, so that Hydro was then responsible for the administration of a plan they could not readily afford or adapt to the current economic state. The cost of the plan has not been as formidable for OTEU, largely because each OTEU member is assessed two dollars and seventy-five cents per month specifically for the job evaluation plan. The members agreed to this assessment at the time of the ratification vote in 1982. These fees go towards the joint cost of the JEMAC, as well as expenses incurred by the OTEU JEMAC committee members. Additionally, OTEU had employed two full-time staff members to monitor the plan, although recently that number was reduced to one. One OTEU representative estimates that the total cost to OTEU has been approximately one-hundred and fifty thousand dollars per year. She defends this cost and the assessment fee, maintaining that the potential benefit of the plan to employees justifies the expense.

The Hydro representative does not share OTEU’s belief that an effective training/education program would mitigate the technical complexities of the plan. Although all information is accessible, it is not readily comprehensible. Therefore the openness of the
plan is believed to amplify the problems of employee misunderstanding. The Management representative believes that one positive feature of the plan is the provision for a regular review of all the positions which, he maintains, is the key to smooth maintenance and plan flexibility. Because of the appeal backlog, however, this provision has yet to be exercised. Both Union and Management representatives suggest that the "democratic" nature of the plan is largely responsible for the exceptional backlog of appeals and the dilatoriness of the process itself. The plan provides for all parties (Union, Departments, Analysts) to be represented and involved in the process; however, the logistics of coordinating all parties to attend meetings precludes an expeditious process. This has caused a great deal of frustration which both parties are endeavouring to resolve.

At the time the plan was ratified by BC Hydro, a survey of all line managers indicated only "adequate" acceptance of the plan and the Hydro representative speculates that there has been a slight negative shift since then. Senior management personnel have been even less supportive and their attitude is said to be that of "they wish it wasn't there". Recently, the job evaluation section administering the OTEU plan was reduced from eight employees to just one (with the possibility of two more joining the staff in the future). Although Hydro representatives could not comment on the cutback, it would appear to be a clear signal of withdrawal of Management support. This lack of senior management support, the high cost of the plan, and its technical complexity have caused Hydro to question the viability of maintaining the plan. Hydro, in fact, has recently submitted a proposal to the Union, suggesting modifications to the job evaluation plan. The proposal is currently under discussion at the bargaining table and thus no information with respect to the details of the modifications or the parties' positions on them could be disclosed. However, the modifications are said to address Management's concerns with respect to the administrative problems (e.g., plan cost, appeal process delay) and not the methodology itself.

At a glance, the BC Hydro/OTEU Job Evaluation Plan appears to be an exemplary,
"textbook" plan. It is a jointly developed and totally open plan which should enhance union and employee acceptability. It is governed by a comprehensive evaluation manual which should facilitate consistency and durability, and further, the quantitative methodology of the point factor technique, itself, is generally noted for the validity of the evaluation results. The creation of an independent department of technical specialists to maintain the plan should enhance credibility and objectivity. The existence of the Steering Committee and provisions for a regular audit should provide flexibility and proper wage structure maintenance. Finally, maintaining an in-house appeal body should ensure efficient adjudication of disputes without third party intervention.

Despite the strengths of these components, they have been overshadowed by the cost and the inability of the appeal process to handle the volume of disputes arising from implementation of the plan. Having recognized these deficiencies, Hydro is endeavoring to rectify them through negotiated modifications. If the proposals are ratified by OTEU, only time will tell whether these problems can be alleviated, to facilitate the BC Hydro/OTEU Job Evaluation Plan's realization of its potential as a model plan.
CHAPTER VI

ANALYSIS AND DISCUSSION

Chapter I reviewed the literature regarding the effects of exogenous and indigenous factors on job evaluation plans. By assimilating the myriad of theories and research findings a composite job evaluation plan prototype can be synthesized, as described below. A prototypical or "model" job evaluation plan is developed and implemented on the basis of an organizational needs analysis, performed prior to implementation. It is bilaterally developed and administered, provided joint development is compatible with the industrial relations environment. A high level of senior management support ensures successful implementation and plan maintenance. Furthermore, the plan has a greater likelihood of success if the organization offers wage rates higher than the market rates. The terms of reference for plan implementation and maintenance are clearly outlined either in the Collective Agreement or a supplementary binding agreement. Furthermore, the relationship between the job evaluation plan and other pertinent provisions within the Collective Agreement is compatible and clearly defined in the contract. A "model" job evaluation plan applies a quantitative evaluation methodology (e.g., factor or point method), with certain modifications to accommodate external parity and adaptability to technological change. Recourse for appeal of a classification decision exists, either through the grievance procedure or an independent review mechanism. In addition to the appeal process, the job evaluation plan results are subject to regular audits. The information regarding the job evaluation plan and all evaluation decisions is accessible to all parties. Finally, the wage and classification structure established facilitates satisfactory promotional paths for employers, yet, at the same time enables management to effectively organize the work.

Three different job evaluation plans, currently applied in British Columbia, have been observed in this study and described in the preceding chapters. Each plan reflects historical,
environmental and indigenous influences peculiar to the individual organization. Yet, at the same time, all experience certain common exigencies. Using the job evaluation plan prototype as a framework for discussion, the intent of this chapter will be to conduct a comparative analyses of the components of the sample plans.

Internal Factors

Development and Implementation

Research suggests, as does common sense, that the goals and mechanisms of a job evaluation plan must reflect the specific organization needs and parameters. Despite academic endorsement of a systematic organizational needs analysis and plan selection process, there is no evidence, from this study, that this approach to plan development is commonly practiced. The purpose of the job evaluation plans in this study was, commonly, to measure job worth and, in so doing, maintain a rational internal wage/classification structure. Despite this common purpose, the three sample plans represent quite different approaches to plan development and implementation.

Little historical information was available regarding the UBC plan, and the speculation was that it had simply evolved over the years, in the absence of any strong management directive. The scope of the UBC plan has always been to provide a means of measuring wage relativities. However, there is no evidence that situational variables were taken into consideration to determine what type of plan would be best suited to measure differentials, within UBC's structure specifically.

In contrast, BC Tel established a specific mandate for the evaluation plan and methodically determined which system would best meet its particular organizational needs. Furthermore, the job evaluation plan represents a more encompassing, articulated compensation policy, that policy being to maintain maximum control over pay expenditures. From its inception, the BC Tel plan has reflected a strong "applied measurement" approach,
i.e., the effectiveness of the plan is assessed in terms of the accuracy and reliability of the results, only. BC Tel's unwavering adherence to this objective appears to have contributed to the plan's strength as a management tool.

BC Tel's systematic plan development is the recommended practice by scholars and practitioners. However, despite the difference between UBC's evolutionary plan development and BC Tel's systematic plan development, both plans are of the same vintage (approximately thirty to forty years old) and both have seemingly, "withstood the test of time". Although it is unlikely anyone would advocate a *laissez-faire* approach to plan development, this approach does not appear to have negatively affected the current effectiveness of the UBC plan. Furthermore, as compared to the BC Tel plan, the difference in developmental approaches does not appear to have resulted in significant differences in plan utility or effectiveness. The durability of the UBC plan, despite the lack of methodical development, can be attributed in part to the static nature of the organizational environment and the simplicity and flexibility of the evaluation methodology itself. Both these factors will be discussed in greater detail later in this chapter.

Within both UBC and BC Tel, the job evaluation plan was developed as a management function prior to bargaining unit certification. Therefore, with respect to the Union's role in the development and implementation process, both CUE and TWU's approach *vis a vis* the plan has been purely reactive. The creation of CUE (or AUCE as it was then called) as a bargaining agent was largely an employee reaction against UBC management style and practices. Therefore by virtue of being a management function, the job evaluation plan has been under scrutiny and suspicion since certification. CUE has general concerns regarding the subjectivity of the plan and its inability to measure adequately comparable worth. However, these concerns have not been translated into specific goals or objectives, so that rather than challenging the plan itself, the Union's position is demonstrated through the pursuit of individual appeals and grievances. Therefore, like its management counterpart,
CUE's role in the plan process and administration has gradually evolved as a response to UBC's administration of the plan, rather than reflecting an assertion of an articulated policy on job evaluation.

TWU also questioned the subjectivity of the BC Tel plan; however, the Union approach recently was to pursue changes to the plan itself. To this end, TWU outlined its specific concerns (e.g., the inequity of some of the factors, the need for plan simplifications) and reviewed alternative plans in terms of their suitability to the BC Tel/TWU experience. The TWU medium for facilitating change has been the Special Joint Job Evaluation Review Committee, as opposed to CUE's approach of chiselling away at change through the grievance-arbitration route. The efforts towards change, of both CUE and TWU, have not significantly altered the balance of power in the administration of the job evaluation plan.

In contrast, the BC Hydro/OTEU plan exemplifies an entirely different developmental experience, one which was initiated and controlled largely by the Union. As with CUE and TWU, OTEU was dissatisfied with the subjectivity of the plan, as well as with its inconsistent administration. However, OTEU's approach to rectification was far more aggressive and comprehensive. By giving it priority as a strike issue at the negotiation table, OTEU was able to ensure its participation in the joint development of a new plan, whose fundamental purpose was to measure the relative worth of jobs. Additionally, OTEU required that the plan be open, enhance information accessibility, be democratic and provide for an impartial appeal process. With these goals in mind, and taking into consideration the occupational composition of the bargaining unit, the current plan was developed. There is no indication that, at any time throughout the development, Management had assessed and/or asserted its objectives with respect to the plan. As a result, Hydro has experienced some fundamental problems with the plan since the joint task force disbanded and the plan was turned over to Management for unilateral administration. Furthermore, any changes to the plan which might alleviate these problems for Hydro can only be achieved with Union
concurrence. In essence, developing the plan on the basis of OTEU goals, and in the absence of counter balancing Management goals, for the most part has precluded the plan from ever achieving sufficient Management acceptance to be stable.

Whereas the evolutionary development of the UBC plan and the systematic development of the BC Tel plan had apparently met the needs of the respective organizations, the development and implementation of the BC Hydro/OTEU plan has created current instabilities in the plan. Hydro's experience illustrates the pitfalls (as described in the literature) of implementing a job evaluation plan, particularly one as complex and resource draining as the Hydro/OTEU plan, without an initial needs analysis and prior goal delineation.

Senior Management Support

The absence of specific management goals and control of the BC Hydro/OTEU plan from the onset of its development and implementation, appears to be correlated with vacillating senior management support of the plan. When the change in plans was first demanded by OTEU, Management's role was one of acquiescence, as opposed to one of commitment to the new plan. Although support has fluctuated over the years, currently, the high costs of the plan is a major concern to Management. This concern has prompted Hydro to seek OTEU support of administrative changes to the plan which would make it more practical and suitable to Hydro's current economic state. If these changes are successful, the plan may gain management support and, hence, much needed plan stability.

The level of senior management support of the job evaluation plan was not noted as an issue for UBC or BC Tel. Presumably, then, the plans have sufficient management support to maintain effectiveness. The costs of both UBC and BC Tel's plans were significantly less than that of the BC Hydro/OTEU plan and both plans appeared to function effectively within the organizations' financial constraints.

Research has shown that weakness in the installation process and lack of senior
management support are significant factors contributing to the failure of the job evaluation plans.\(^{49}\) Certainly, Hydro's experience suggest that two internal variables impacting on plan stability and effectiveness are the level of senior management support and commitment, as well as, the compatibility of the cost of the plan with the level of management support and resource availability.

Organizational Environment

When the data framework for this study was developed the effect of the organizational environment (i.e., the type of business and, hence, the composition of the organization's work force) on the suitability of the job evaluation plan was not contemplated. However, through the data collection process the importance of this factor became apparent. For example, when developing their plans, both BC Hydro and BC Tel took into consideration, primarily, the specific types and diversity of jobs to be measured and selected methodology that, they believed, was capable of evaluating their particular labour forces. Both BC Hydro and BC Tel employ a large, relatively diverse work force, therefore, they both required a measurement tool capable of comparing dissimilar jobs. The point factor method was, and is still, perceived by Hydro and BC Tel, to be the most appropriate methodology for the work force. The work force within UBC, on the other hand, is less heterogeneous. As a result, UBC's evaluation measurement needs appear to be met satisfactorily with what is generally regarded as a less sensitive tool, the classification method. (See the Evaluation Methodology section, later in this chapter, for a more detailed discussion.)

Additionally, the dynamics of the work force appear to play a role in the suitability of a job evaluation plan. A dynamic work force, e.g., BC Tel and BC Hydro, subject to a high volume and rapid pace of job change (in these cases, as a result of changing technology, diversification of business, work force reduction, etc.), appears to place greater pressure on the job evaluation plan. Therefore, a plan operating in such an environment must offer an
expedient methodology and administrative process. Both BC Tel and BC Hydro are experiencing difficulties meeting these needs, with their existing plans. Although UBC's environment appears more static than that of BC Hydro and BC Tel, in terms of changes to job functions, services being offered, technology, etc., UBC also experiences an inability to keep pace with their job evaluation needs. UBC's problem, however, appeared less acute than that of BC Hydro's or BC Tel's. The observations of the sample study indicate that the organizational environment does have some effect on the suitability of a job evaluation plan. (The section on Job Evaluation Plan Administration and Methodology, later in this chapter, explores this observation in more detail.)

**Environmental Factors**

**Labour Market Influences**

The purpose of all the sample job evaluation plans is to measure job worth and to establish/maintain internal equity. However, as discussed in Chapter I, job evaluation must, somehow, achieve a balance between the value of a job to the organization and the market-determined value of the job. An imbalance between internal equity and external parity can create tensions within the salary system. Research has suggested, however, that the higher the wage level of an organization relative to market rates, the greater the likelihood of success of a job evaluation plan.

The BC Hydro and BC Tel plans measure the value of a job on the basis of internal equity only, therefore, rates established by the job evaluation plan are set independent of external labour market rates. If a position cannot be readily measured on this basis it will be excluded from the plan and its rate will be set separately, perhaps using market rates. External labour market rates are taken into consideration, for those positions covered by the plan, through the contract negotiation process and adjustments for external parity, if required, will be made at that time. Currently, both BC Tel and BC Hydro offer rates higher
than the market rates for unionized clerical employees. As a result, neither of the plans appears to be strained by endeavoring to reconcile internal equity and external parity.

On the other hand, UBC, although utilizing internal comparisons primarily, may consider external market value rates when measuring jobs under the job evaluation plan. However, the effect of introducing select market rates to a wage structure based primarily on internal relativities has been a distorting of the wage structure. Furthermore, because UBC's salary rates are lower than those offered by BC Tel and BC Hydro, the pressure on the job evaluation plan, with respect to balancing external parity, is much greater than that experienced by the other two plans. Although only isolated positions were cited as problems (e.g., Clinical Secretaries and Computer Operators), the effectiveness of the UBC job evaluation plan appears to be contingent, in part, upon UBC's wage rates maintaining, at least, external parity.

Both UBC and BC Hydro are subject to external economic policy (e.g., the Compensation Stabilization Program) and wage constraints. Although it was originally hypothesized that ceilings on wage increases might precipitate a rise in individual reclassification requests, there was no apparent correlation in either case. The explanation offered by the CUE representative was that employees were simply not aware of the possible channel for wage increases through job evaluation. One Hydro representative speculated that, throughout the recent tumultuous period of lay-offs, employees have been too preoccupied with the issue of job security to focus on the matter of their relative wage level. Alternatively, employees themselves may think more in terms of internal equity, versus external parity, and therefore may not pursue a reclassification request if their relative internal ranking was stable.
Industrial Relations Environment

The effect of the industrial relations climate on job evaluation plan effectiveness has not been well documented in the literature. Indeed, the correlation observed in this study is nebulous, at best. The labour relations between UBC and CUE, BC Tel and TWU, and BC Hydro and OTEU have been tumultuous over the years. For example, the task of jointly developing the BC Hydro/OTEU job evaluation plan was said, by a Hydro representative, to have improved the labour relations climate while the task force was in effect. However, relations are perceived, by Management representatives, as having deteriorated somewhat since the implementation of the plan. The relationship between UBC and CUE has experienced turbulence since the time of bargaining unit certification. The atmosphere of animosity and suspicion in which AUCE was organized has lingered (although diffused) and may have manifested itself, in part, in an on-going challenge of the job evaluation plan. Both CUE and UBC perceive the job evaluation related arbitration rate as low. However, it is significantly higher than that recorded for BC Tel and TWU, despite the fact that BC Tel and TWU have had, historically, a confrontative relationship, as well.

In the sample, the balance of power between management and the union, vis a vis the job evaluation plan may have mirrored the general relationship between management and the union. However, the stability of the plan did not appear, necessarily, to correlate with the industrial relations climate. In fact, both parties in all the sample organizations noted that the dealings with respect to the job evaluation plan were less adversarial than with other personnel or labour relations functions. The lack of controversy surrounding job evaluation may be a result of the fact that both management and labour have an interest in ensuring equitable internal wage relativities. It was generally acknowledged, by all parties in the sample, that job evaluation, by nature, is not an adversarial issue. Furthermore, the effectiveness and acceptability of the sample job evaluation plans did not appear to correlate with the industrial relations climate.
Job Evaluation Methodology and Plan Administration

Terms of Reference

The contractual terms of reference which define the scope of the plan, the role of each party in developing and administering the plan, etc., will reflect, naturally, the industrial relations environment and the balance of power between management and labour. The contractual provisions governing the job evaluation plan are a key determinant in a Union's position in monitoring plan administration and challenging evaluation decisions.

All of the unions within the sample have opted to maintain management's unilateral administration of the plan, while exercising the right to challenge management's decisions. The sample unions' stance supports Janes' findings of a growth of labour's acceptance of job evaluation with the right to challenge. One union representative has observed, as have researchers, that labour has traditionally shied away from involvement in job evaluation plans, although union interest in plan administration has grown significantly in the past few years. Certainly from this study, it would appear that labour's position on job evaluation has shifted over the years from skepticism to the current position of qualified acceptance. Accordingly, job evaluation was accepted as a management function, with the sample unions regarding their role as one of ensuring that management administers the function fairly and equitably. The contractual terms of reference which define the role of the union and the scope of their monitoring abilities, therefore, have become a key component of a job evaluation plan, within a unionized setting.

The latitude with which the Unions can police the plans varies according to contracts. For example, Article 31 of the UBC/CUE Collective Agreement (contained in Appendix B) does not limit UBC's choice of evaluation methodology although it does outline the reclassification procedure. Additionally, Article 31.01 provides CUE with the ability to block the implementation of Job Descriptions by virtue of the clause stating "Revised or new Job Descriptions and/or Paygrades will not be implemented until accepted by the Union."
Accordingly, all Job Standards in existence have at least tacit Union acceptance, although disputes can still arise over individual job value comparisons against these standards (i.e., specific job evaluations and reclassification). In the event of employee or Union dissatisfaction with an evaluation decision, recourse exists through the grievance-arbitration procedure. The current contract language regarding job evaluation was negotiated into the first Collective Agreement. Considering the hostile and suspicious climate shrouding AUCE's certification, the Union's interest in establishing an effective blocking and policing position is understandable. The language of Article 31.01 places the Union in a strong position to challenge Management, according to the CUE representative. Yet, Management does not find Article 31.01 unduly constricting in practice and has, in fact, negotiated the same language into other bargaining unit contracts. The UBC representative interprets the fact that the language has not been brought back to the bargaining table since its inception as an indication that the terms of reference are satisfactorily meeting both parties' needs.

In contrast, TWU, through successive contract negotiations, has gradually strengthened its monitoring role. Article 7 (detailed in Appendix C) stipulates that "The Company will provide for joint consultation with the Union on new classifications prior to their implementation...". Although TWU thus does not have the right to block implementation as CUE has, its participation in the process is ensured. By 1982, TWU had compiled specific concerns with facets of the plan methodology so that, through negotiations, it actively pursued a stronger role in the plan process. TWU initiatives resulted in a Letter of Understanding, signed December, 1982, which provided for greater scope for what remained, in essence, its participatory role. The Letter of Understanding also provided for a channel for conflict resolution through joint discussion in the event the Union disputes job descriptions, factor ratings or classification. If the conflict is not resolved through joint discussion, the issue will be referred to arbitration. Although the relationship between BC Tel and TWU historically has been notoriously adversarial, the provisions outlined in the 1982
Letter of Understanding reflect the more recent trend towards greater cooperation and more constructive, open lines of communication between the parties. There are frequent meetings between TWU and BC Tel representatives regarding job classification which, when correlated with the recent absence of any formal grievances, suggests that the new, open forum for conflict resolution is succeeding. As a result, the Union has strengthened its monitoring role through this process without significantly weakening Management's control over the job evaluation plan as a management tool.

The balance of power between BC Hydro and OTEU, *vis a vis* the job evaluation plan, is far more complex. Article 2 of the Collective Agreement (outlined in Appendix D) contains provisions ensuring information accessibility and no loss of salary to downgraded employees, as well as provisions clarifying the Union's right to challenge Management decisions and the procedure by which to do so, all of which are common terms of reference governing a unilaterally administered plan. However, unique to the Hydro/OTEU agreement is that the evaluation methodology, as jointly developed, is bound to the Collective Agreement as well. Therefore, by acceding to OTEU's 1974 demands for a jointly developed plan, Hydro surrendered its management control over the job evaluation plan. Of note is the fact that BC Tel was faced with a similar Union challenge of the subjectivity and factor equity of the job evaluation plan; however, while agreeing to work jointly with the Union to resolve its concerns, BC Tel, in contrast with BC Hydro, established at the onset that the existing rankings (i.e., the fundamental structure) would not be subject to modifications. Therefore, BC Tel retained the management determined standards of wage differentials and the right to apply its choice of evaluation methodology.

Having jointly developed a binding plan to its satisfaction, OTEU then opted for Management to unilaterally administer the plan. In addition to providing the Union with the right to challenge Management's administration, the terms of reference regarding the plan also provides for Union representation on the joint appeal committee. Therefore, although
OTEU cannot block Management implementation of a classification, its position to challenge evaluation decisions is maximized.

Job evaluation specialists recommend the inclusion of clearly defined terms of reference for the job evaluation plan in the Collective Agreement. All of the sample plans comply with this recommendation although the balance of power established by the terms of reference varies considerably between the three plans. The terms governing the BC Hydro/OTEU plan are the most constricting to Management and ensure the strongest monitoring role to the Union, of the three plans. In contrast, the strongest management control over the plan appears to be held by BC Tel, although TWU has been gradually achieving a stronger participatory and monitoring role. The terms of reference respecting the UBC plan appear to be the most stable of the three plans, reflecting a balance of power acceptable to both Management and the Union.

Integration with the Collective Agreement

Researchers and consultants recommend that the contractual provisions governing job evaluation are compatible with all other related provisions within the Collective Agreement. As one would expect, the job evaluation results, of all the sample plans, were bound to the negotiated wage schedule. Otherwise, in all the sample organizations the terms of reference governing the job evaluation plan were not actually integrated with other provisions within the Collective Agreement. The important exception, however, was the influence of the classification structure on the lay-off provisions of the UBC/CUE and the BC Hydro/OTEU Collective Agreements. Both contracts limit bumping, in the event of lay-off or technological change, to within classifications (UBC/CUE) or family of classifications (BC Hydro/OTEU). (Lay-off is by seniority exclusively, within the BC Tel/TWU Collective Agreement.) The qualification on job security caused by the limitation of these provisions is perceived, by CUE and OTEU, to be problematic. However, the job evaluation process and resulting
structure is not seen to be the difficulty. Rather, the CUE and OTEU representatives maintain that the weakness and need for change is with the contract language respecting lay-offs, itself.

The job evaluation function was independent of most other operational personnel/industrial relations functions, in all the sample organizations. All the organizations chose to use the job analysis information for job evaluation purposes only. Consultative services offered by the job evaluation department, with respect to organizing departmental structure and work flow, were available upon request. However, it was clear that the jurisdiction to organize the work rested with the first line supervisors, and the role of the job evaluation division, in all the firms, was to measure the resultant division of labour.

Because the focus of the job evaluation plan and the use of the job evaluation information was separate from and independent of most other personnel/industrial relations function, the degree of integration and compatibility with other provisions within the Collective Agreement was not significant and appeared not to have any bearing on plan effectiveness or acceptability.

Wage and Classification Structure

As indicated in the previous section, all the sample evaluation plan results were bound by the negotiated wage structure of the organization. However, although the number of levels within the salary hierarchy is fixed, the number of job groupings, or classifications is determined solely through job evaluation. The number of classifications in an organization can affect a variety of personnel and labour relation functions (e.g., lay-offs, as discussed earlier).

Of the sample organizations, BC Hydro maintained, by far, the greatest number of classifications. Neither Hydro nor OTEU knows specifically the current number of classes in existence, although the conjectures range from twelve to sixteen hundred. Using an average
of fourteen hundred, a ratio of one job group per 2.5 employees exist. In comparison, BC Tel maintains only four hundred classifications for the same number of employees, i.e., one class per 8.75 employees. On the face of it, the differences in the nature of each organization's business (i.e., public utility versus telecommunications) does not explain the magnitude of difference in the specialization of labour. Although the literature suggests that multiple classifications would be problematic in terms of organizing the work, the classification structure does not appear to be limiting BC Hydro management in any manner. In previous years, OTEU aimed to reduce the number of classifications; however, the issue of classification numbers is not currently a high priority. Therefore, even if the number of job groupings within BC Hydro is somewhat inexplicable and exceptional, it is not perceived to be dysfunctional by either Union or Management and this is, perhaps, the more important point. BC Tel management maintain that its classification structure is effective, particularly in terms of enhancing its policy of internal recruitment and career tracking.

The services offered by UBC and the technology used to provide those services are substantially less diverse and complex than that of either BC Tel or BC Hydro and therefore, the classification structure within UBC is significantly different from the other two. The more homogeneous occupational composition within UBC is reflected in a ratio of one class per twenty-six employees (as compared with Hydro's one class per 2.5 employees and BC Tel's one class per 8.75 employees).

Despite the difference in the number of job groups or classes, the number of paygrades in the wage schedule of BC Tel, BC Hydro and UBC is within the same range (ten paygrades, fourteen paygrades and eleven paygrades respectively). As mentioned earlier in Chapter I, the British Institute of Management recommends this range for large organizations, suggesting that it offers reasonable promotional opportunities without constraining management's organization of the work. The differentials between each paygrade of the BC Hydro scale are a uniform 9 percent. With the exception of the differential between the first and second
paygrade (which is 2.49 percent), BC Tel maintains differentials ranging from 5.3 to 7.7 percent, with the largest differentials occurring between the mid-range paygrades. UBC's payscale is far less uniform than those of BC Tel and BC Hydro. There exists at UBC, approximately, a 4 percent differential between each of the lowest seven paygrades (with the exception of a 2.15 percent differential between the fourth and fifth paygrade); however, the differentials more than double between the top four paygrades. The disproportionate pay differentials were not noted as a problem by either UBC or CUE: however, a compounding of the inequality over the years could distort the wage schedule dramatically. Even though some structural problems can be rationalized through negotiations (e.g., compressing the wage structure by eliminating the lower paygrades), paygrade distortion can become a serious problem. More importantly, it may be a symptom of inadequacies in the job evaluation methodology.

Job Evaluation Methods

As discussed in Chapter I, research findings suggest negligible differences in results between the various evaluation methods. Nevertheless, in the literature, the point factor method is reputed to be potentially the most accurate and reliable and is currently the most widely used method. However, devising a universally acceptable means of measuring the accuracy and reliability of a job evaluation plan has eluded researchers to date. Because job evaluation measures the value of a job to the organization, by definition it is a subjective rather than scientific measurement and, hence, the quality of that measurement is itself somewhat immeasurable. At best, a technically sound evaluation methodology would minimize subjective discretion, as well as provide comprehensive guidelines to ensure consistency when judgment is exercised.

It is not within the scope of this study to provide a detailed assessment of the results of each plan (i.e., the accuracy and reliability) nor is it possible to determine the
convergence between plans. Rather, our intent here is to consider the sample parties' acceptance of the plan results and the apparent soundness (i.e., logic and comprehensibility) of the methodologies employed.

Both BC Tel and BC Hydro/OTEU apply a point factor method of job evaluation, customized for their particular organization. There is one less factor measured in the BC Hydro/OTEU plan than in the BC Tel plan (nine versus ten), although the point values of three of the Hydro/OTEU factors are determined through a factor matrix. Several of the factors being measured by each plan are similar in nature, and the guidelines for assigning point values to these factors are not incongruous. Additionally, the factor weightings (i.e., the relative value of each factor) are reasonably consistent between the two plans. (Table I lists the factors of each plan and their weightings, aligning those factors which measure, generally, the same job elements.) Because BC Tel and BC Hydro employ a similar (predominantly clerical) occupational group, the similarity between the factors is to be expected.

Despite the similarities in methodology and factor selection, important differences exist between the Hydro/OTEU and BC Tel plans. The BC Hydro/OTEU plan is technically far more complex than that of BC Tel. A seventy-six page manual offers explicit application instructions and factor definitions for the measurement process of the Hydro/OTEU plan, while the guidelines for the BC Tel plan are covered in ten pages. As an example of the differences in point calculation complexity, Table II provides a comparison of the Working Conditions factor of the Hydro/OTEU plan and the Job Conditions factor of the BC Tel plan. These two factors measure, roughly, the same aspect of a given job, and are assigned similar weightings relative to the other factors in each plan, however, the Working Conditions factor is obviously a far more complex measurement.

Although the BC Hydro/OTEU plan is more detailed and complex than the BC Tel plan, the BC Tel plan does not appear to be a significantly less effective measurement tool.
### TABLE I

COMPARISON OF POINT FACTOR WEIGHTING

<table>
<thead>
<tr>
<th>BC HYDRO</th>
<th>BC TEL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Factor</strong></td>
<td><strong>Percentage of Total Point Value</strong></td>
</tr>
<tr>
<td>Formal Education</td>
<td>23%</td>
</tr>
<tr>
<td>Experience</td>
<td>20%</td>
</tr>
<tr>
<td>Analysis</td>
<td>7%</td>
</tr>
<tr>
<td>Judgement</td>
<td>7%</td>
</tr>
<tr>
<td>Creativity</td>
<td>7%</td>
</tr>
<tr>
<td>Decisions</td>
<td>19%</td>
</tr>
<tr>
<td>Communications</td>
<td>11%</td>
</tr>
<tr>
<td>**</td>
<td></td>
</tr>
<tr>
<td>**</td>
<td></td>
</tr>
<tr>
<td>Working Conditions</td>
<td>6%</td>
</tr>
<tr>
<td>Work Leadership**</td>
<td>0%</td>
</tr>
<tr>
<td>**</td>
<td></td>
</tr>
<tr>
<td>**</td>
<td></td>
</tr>
</tbody>
</table>

| | 100% |
| | 100% |

* No equivalent factor

** If work leadership function exists the incumbent receives an additional paygrade.
TABLE II
"WORKING CONDITIONS" FACTOR VERSUS "JOB CONDITIONS" FACTOR

<table>
<thead>
<tr>
<th>B.C. HYDRO/OTEU JOB EVALUATION PLAN WORKING CONDITIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAGE 47</td>
</tr>
<tr>
<td>----------</td>
</tr>
<tr>
<td>FACTOR:</td>
</tr>
<tr>
<td>Definition: Working Conditions are the &quot;physical&quot; aspects associated with the job and are measured in terms of the degree of exposure to undesirable or disagreeable conditions on the basis of the following sub-factors:</td>
</tr>
<tr>
<td>1. Environment: Exposure to adverse or undesirable conditions such as weather, dirt, dust, noise, heat or poor lighting.</td>
</tr>
<tr>
<td>2. Hazards: Exposure to accident or health hazards.</td>
</tr>
<tr>
<td>Application Instructions:</td>
</tr>
<tr>
<td>1. The rating for working conditions shall be that awarded for the higher-rated sub-factor. However, where both sub-factors have the same rating, the next higher level shall be awarded; this does not apply to adverse or undesirable conditions.</td>
</tr>
<tr>
<td>2. Environment:</td>
</tr>
<tr>
<td>(i) Examples of adverse or undesirable conditions include:</td>
</tr>
<tr>
<td>- Dusty, dirty, muddy, or greasy areas;</td>
</tr>
<tr>
<td>- Unpleasant odors;</td>
</tr>
<tr>
<td>- High levels of noise;</td>
</tr>
<tr>
<td>- Heat, cold, damp or drafty environment;</td>
</tr>
<tr>
<td>- Noisome, dirty, rainy, or otherwise inclement weather;</td>
</tr>
<tr>
<td>- Insufficient or too high a level of lighting;</td>
</tr>
<tr>
<td>- Crowded or inadequate work space.</td>
</tr>
<tr>
<td>In assessing adverse or undesirable conditions, whether they are major or minor, consideration should be given to the extent to which one or more adverse conditions are present and the relative degree of unpleasantness they represent.</td>
</tr>
<tr>
<td>In determining the factor level, &quot;rarely&quot; would apply when exposure is less than 10%, &quot;seldom&quot; would apply when exposure is between 11 and 50%, and &quot;frequent&quot; would apply when exposure is greater than 50%.</td>
</tr>
<tr>
<td>(ii) Weather: In assessing whether weather should be considered a major or minor environmental condition, the analyst should consider, among other factors, whether the employee can control the listing and duration of his exposure, i.e., is exposure mandatory or optional.</td>
</tr>
<tr>
<td>FACTOR: JOB CONDITIONS</td>
</tr>
<tr>
<td>Definition: Job Conditions are the &quot;physical&quot; aspects associated with the job and are measured in terms of the degree of exposure to undesirable or disagreeable conditions.</td>
</tr>
<tr>
<td>1. Environment: Exposure to adverse or undesirable conditions such as weather, dirt, dust, noise, heat or poor lighting.</td>
</tr>
<tr>
<td>2. Hazards: Exposure to accident or health hazards.</td>
</tr>
<tr>
<td>Application Instructions:</td>
</tr>
<tr>
<td>1. The rating for job conditions shall be that awarded for the higher-rated sub-factor. However, where both sub-factors have the same rating, the next higher level shall be awarded; this does not apply to adverse or undesirable conditions.</td>
</tr>
<tr>
<td>2. Environment:</td>
</tr>
<tr>
<td>(i) Examples of adverse or undesirable conditions include:</td>
</tr>
<tr>
<td>- Electricity, fire, noxious gases, toxic or corrosive chemicals, hot, fuming, etc.;</td>
</tr>
<tr>
<td>- Power tools or machinery, construction equipment, heating or cooking equipment, cranes;</td>
</tr>
<tr>
<td>- Slippery or uneven ground conditions, scaffolding, falling objects, sharp implements;</td>
</tr>
<tr>
<td>- Driving.</td>
</tr>
<tr>
<td>Examples of conditions contributing to the degree of risk that a hazard represents include:</td>
</tr>
<tr>
<td>- The proximity of the hazard;</td>
</tr>
<tr>
<td>- The function to be performed;</td>
</tr>
<tr>
<td>- The degree of protection or safeguards available.</td>
</tr>
<tr>
<td>In determining the factor level, &quot;rarely&quot; would apply when the exposure is less than 5% of the time, &quot;seldom&quot; would apply when the exposure is between 5% and 10%, and &quot;frequent&quot; would apply when the exposure is greater than 10%.</td>
</tr>
<tr>
<td>(ii) Driving: Driving on urban or rural roads would be major undesirable. However, the hazard from driving can become major if the roads are steep, excessively rough or icy. Travel on active logging roads can also be a major hazard if the vehicle is not equipped with a radio to hear logging traffic communications. Isolation can also convert a minor driving hazard into a major one.</td>
</tr>
<tr>
<td>(iii) Chemicals, Electric Shock and Hazardous Equipment: These conditions would normally represent minor hazards, on the assumption that safeguards are in place and safe procedures are being followed. However, in some cases the hazards may be major, such as:</td>
</tr>
</tbody>
</table>
| **TABLE II**

<table>
<thead>
<tr>
<th>FACTOR MATRIX</th>
</tr>
</thead>
<tbody>
<tr>
<td>LEVEL</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>4</td>
</tr>
</tbody>
</table>

10. JOB CONDITIONS

This factor recognizes those conditions inherent in the job which make the work relative disagreeable.

Points | Degree | Details |
-------|--------|--------|
0      | A      | No unusually undesirable conditions associated with the work. |
10     | B      | Work must be performed with unusually dirty media or equipment (oil, grease or printer's ink), or in unusually dirty locations, and results in soiling of hands or clothing to an unusual extent. |
Furthermore, the technical complexity of the BC Hydro/OTEU plan is potentially problematic, reducing plan comprehensibility for those affected by it and those administering it. For example, the factors of Analysis and of Judgement are two separate factors under the Hydro/OTEU plan, while analysis and judgement are measured as one factor under the BC Tel plan. As can be seen from Table III, the application instructions for measuring the Hydro/OTEU factors of analysis and of judgement are different, although the level definition is exactly the same. As a result, the instructions provide a somewhat ambiguous distinction between the two factors. Extreme caution would have to be exercised during the evaluation process to ensure that the same element is not measured twice. BC Tel avoided the difficulty, seemingly without loss of measurement sensitivity, by considering analysis and judgement as facets of the same compensable factors (see Table IV). Therefore, in comparison to the BC Tel plan, the benefits of technical complexity and detail do not necessarily outweigh the potential difficulties in comprehension and application of the BC Hydro/OTEU plan.

Both Hydro and OTEU acknowledge that their plan is technically complex and not readily comprehensible, however, both parties appear to be satisfied with the accuracy and reliability of the plan. In fact, perhaps the greatest strength of the Hydro/OTEU plan is in the mutual acceptance of the measurement standards applied in the job evaluation plan: an obvious advantage of a jointly developed plan. Researchers recommend union involvement in the factor selection process and cite the obvious—that union acceptance is an important criterion when choosing and weighting factors.  

Union acceptance of the measurement criteria has not been achieved by the BC Tel plan. In fact, the TWU spokesperson maintained that several of the BC Tel evaluation factors were highly subjective and inappropriately weighted, although the BC Tel representative had full confidence in the accuracy of the plan. On the basis of the low grievance and arbitration rates, it would appear that TWU's concerns are primarily with the
### Analysis

**Table III: Analysis**

<table>
<thead>
<tr>
<th>Level</th>
<th>Level Definition</th>
<th>Point Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Data, instructions and references are familiar and easily understood.</td>
<td>35</td>
</tr>
<tr>
<td>2</td>
<td>Data, instructions and references require some interpretation because the significance, meaning or relationships of the information utilized may not be obvious.</td>
<td>20</td>
</tr>
<tr>
<td>3</td>
<td>Some variables and/or unknowns exist in data, instructions and references available requiring the interpretation and adaptation of existing data, instructions and references.</td>
<td>45</td>
</tr>
<tr>
<td>4</td>
<td>Many variables and/or unknowns existing in data, instructions and references available requiring the interpretation and adaptation of existing data, instructions and references and the development of new data, instructions and references.</td>
<td>60</td>
</tr>
</tbody>
</table>

### Judgement

**Table III: Judgement**

<table>
<thead>
<tr>
<th>Level</th>
<th>Level Definition</th>
<th>Point Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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<td>60</td>
</tr>
</tbody>
</table>

### Analysis and Judgement Factors

**BC Hydro/OTEU Job Evaluation Plan**
### TABLE IV

**ANALYSIS AND JUDGEMENT FACTOR**

**BC TEL JOB EVALUATION PLAN**

#### 3. ANALYSIS AND JUDGEMENT

This factor measures the extent to which features of a job require analysis in the sense of breaking down and identifying information or condition into component elements; and judgment in making decisions on the course of action to be followed once the component elements upon which such decision can be based are known.

<table>
<thead>
<tr>
<th>Points</th>
<th>Degree</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>A</td>
<td>Little or no analysis required and course of action is specified. Work is covered by complete detailed directions and necessary elements are readily recognized.</td>
</tr>
<tr>
<td>10</td>
<td>B</td>
<td>Simple analysis such as breaking down information or conditions into required components for the purpose of applying job procedures or directions; and requiring little or no choice of procedure in the course of action to be followed.</td>
</tr>
<tr>
<td>20</td>
<td>C</td>
<td>Simple analysis such as breaking down information or conditions into required components for the purpose of applying job procedures or directions; and requiring decisions which are governed largely by rule or precedent in determining proper course of action.</td>
</tr>
<tr>
<td>30</td>
<td>D</td>
<td>Analysis involving the breaking down of combinations of simple and somewhat complex information or conditions into required components for the purpose of applying job procedures or directions; and requiring decisions which are governed largely by rule or precedent in determining proper course of action.</td>
</tr>
<tr>
<td>40</td>
<td>E</td>
<td>Analysis involving the breaking down of complex information or conditions into required components for the purpose of applying on new problems which may or may not be governed by rule or precedent in determining proper course of action.</td>
</tr>
</tbody>
</table>
fundamental measurement yardsticks (the factors) and that it is not dissatisfied with the individual applications of the yardsticks. However, through BC Tel's Joint Job Evaluation Review Committee, whose mandate it is to consider and recommend changes to the plan factors, the potential for Union acceptance of the factors exists and, once achieved, could alleviate Union concerns with plan subjectivity. Despite TWU's isolated complaints about some of the factors, both TWU and BC Tel appear satisfied with the point factor methodology per se. While some of TWU's concerns appear valid, in general, the plan seems to be logical and offers adequate refinement of measurement without loss of comprehensibility.

Although UBC applied a different methodology (that of a classification technique), similar factors to those measured by the BC Tel and the Hydro/OTEU plan are taken into consideration in its evaluation process. A qualitative assessment of the complexity, accuracy/accountability, judgement/decisions, supervision given, contacts and job requirements of a position is made and, on that basis, the whole job will be ranked against other whole jobs in the organization. Criticism of the classification technique, in general, revolves around the subjective nature of the technique and lack of concrete evaluation standards. CUE certainly has concerns about the subjectivity of the UBC plan, and would like to see a quantitative plan implemented. Despite the Union's wariness of the plan, the consistency of its application and soundness of the evaluators judgements have always held up under arbitral scrutiny. Therefore, it would appear that the potential problems of the classification method have not been realized by the UBC plan; the measurement standards appear to be reasonable and applied consistently. Although it is not a highly sophisticated measurement tool, it is readily comprehensible and is perceived to have employee acceptance.

The UBC plan, itself, has survived approximately thirty years, and part of its durability can be attributed to the environment within which it functions. The nature and scope of the service offered by the university has remained relatively static for the lifetime of the job
evaluation plan. Furthermore, because the service is relatively single focus and the occupational composition homogeneous, there is not, in the main, a vast range of diversity between the jobs. The classification technique is considered to be a more insensitive measurement than a quantitative method (e.g., point method), so is best suited to a static environment with a limited range of jobs. Because it is not technically complex, the plan can be maintained at a relatively low cost. Researchers suggest that ease of maintenance and cost effectiveness lend durability to a job evaluation plan applying a classification technique, which further explains the durability of the UBC plan.

Job Analysts and the Analysis Process

Much of job evaluation research has focused on the accuracy and reliability of the evaluation methodology, with only peripheral emphasis on the role of the job analyst. Accordingly, when the data framework for the study was developed, the role of the analyst and the analysis process was not anticipated. However, the significance of these factors was subsequently observed and noted through the data collection process.

All the sample organizations employed individuals whose function was, exclusively, job analysis and evaluation. At one time, BC Hydro maintained the largest job evaluation staff, of one analyst per 350 employees, versus UBC's staff of one analyst per 430 employees and BC Tel's staff of one per 700. However, BC Hydro's job evaluation division has been drastically cut back leaving, at the moment, only one analyst to administer the plan for thirty-five hundred employees. The importance of the analyst's role was evident in all the organizations. The UBC representative, for example, attributes the effectiveness of the plan to the analysts, whom he perceives as being thoroughly conversant in the plan and the positions the plan covers. He recognizes that one weakness of the classification system is that stability and consistency is not inherent in the plan structure; rather, the emphasis is on the stability and consistency of judgement of the individuals administering the plan.
Therefore, staff turnover and/or poor training would be extremely detrimental to the effectiveness of the plan. Turnover has not been a problem with the UBC analysts, and the established training program appears to be meeting the incumbents' needs. The UBC training program is very similar, in general format and length, to the program followed by BC Tel, with one exception. UBC recruits trained analysts and familiarizes them with UBC's positions and plan, whereas BC Tel recruits, internally, those with extensive job knowledge and familiarizes them with the process of job analysis and evaluation. Both UBC and BC Tel management representatives perceived the analysts' role to be independent of any other industrial relations or personnel function. The UBC representative saw the role of the Reference Committee as being even more independent which, he believed, enhanced the employees' perceptions of the objectivity of the plan. Again, he noted, that committee member stability was key to the "labour intensive" process.

BC Hydro analysts are also perceived to be independent, but their independence, rather than enhancing objectivity, is perceived by employees as somewhat alienating. The role of the analyst in the organization is somewhat different in BC Hydro than in UBC or BC Tel. For example, the analyst position is a unique classification requiring specialized technical skills (brought to the job, as there is minimal on-the-job training) and does not fall within a natural career path within BC Hydro. In contrast, the analyst position in BC Tel is considered to be an entry level position, with the expectation that the incumbent will move into other human resources roles eventually. Although the move does not follow a career path, per se, UBC analysts also have the opportunity of transferring into other employee relations functions.

None of the organizations (including the unions) within the sample had active education programs respecting the job evaluation process. As a result, the job analyst plays a key role, during the analysis process, in informing employees and supervisors of the mechanics and rationale of job evaluation. Much of the credibility of the plan, therefore, depends upon
the communication skills, as well as, technical skills of the analysts. Furthermore, personnel training and stability is critical for consistent application of the plan. Both UBC's and BC Tel's representatives suggest the time required to become completely conversant in the process was, approximately, one year and that the maximum tenure in the position should be between three and four years. These observations are helpful for manpower planning and the development of staffing and training programs which would facilitate evaluation consistency over the years. Furthermore, the job organization information gained in the analysis process was extremely useful and applicable to a variety of areas. Therefore, the training, development and promotion of the job analysts is a worthwhile human resources investment.

UBC and BC Tel appear to have a satisfactory training and development program, and the analysts are perceived by both managements and the respective unions to be effective in their role. (The TWU, however, does not agree that three to four years tenure in an analyst position provides adequate plan continuity.) However, employee lack of confidence in the analysts appears to be a weakness in the BC Hydro/OTEU plan. It is difficult to determine whether the complexity of the plan has made analyst credibility untenable, or whether it has simply amplified existing weaknesses in analyst staffing. Regardless, this weakness may well be compounded by recent staff reductions within the Job Evaluation Division of Hydro.

The actual analysis process was fairly similar across organizations. Both BC Tel and UBC utilize an incumbent-completed questionnaire supplemented by interviews with the incumbent, supervisor and any other relevant party, which is the general practice. BC Hydro, however, gathered job information through an ad hoc interview process only. In the absence of a standard questionnaire and/or interview format, there is no guarantee of job analysis consistency. Therefore, even though the result of the analysis, i.e., the job description, is verified by the incumbent and the supervisor in all the organizations, the lack of a standard job analysis format is a potentially weak link in BC Hydro's evaluation process. Without a certain level of standardization of the information gathering process, comparison of data from
different sources and at different times can lose meaning.

Job descriptions are compiled, upon completion of the analysis, by all organizations. The description format differs somewhat between organizations, reflecting the variance in the methods of categorizing the information and eventually evaluating it. The Standard Job Description is a key document in the classification method, as applied by UBC, because it is the qualitative description which is the basis for the evaluation. Therefore, the descriptions have to articulate clearly the job requirements, responsibilities, duties, etc., in a manner that differentiates between jobs and, hence, justifies pay differentials. The glossary of terms utilized in UBC's analysis process assists in the standardization of the language and, ultimately, in the consistency of the evaluations. Accordingly, the UBC Standard Job Description (see Appendix E) is a detailed narrative of the job duties and job requirements. In contrast, BC Tel's job descriptions detail job duties only while the job posting gives a very brief overview of the duties and prerequisites (see Appendix F and G). The information used for the evaluation is actually categorized, assessed and recorded on a document referred to as the Substantiating Data Sheet (see Appendix H). The BC Hydro/OTEU job description provides a detailed outline of the duties and responsibilities entailed, as well as the "work circumstances", e.g., formal education and experience, and knowledge acquired on the job. The point value of each factor is included within the job description, although, in contrast to BC Tel's Substantiating Data Sheet, an explanation of the rating is not provided. Particularly in light of the complexity of the Hydro/OTEU plan, a supplementary rating explanation document might be helpful in clarifying the evaluation for the incumbent, supervisor, etc., thereby, preventing unnecessary appeals. Furthermore, if maintained as a job evaluation department record, such a document might provide guidelines for future ratings to enhance evolution consistency.
Appeal Procedures

Irrespective of the accuracy of the job evaluation methodology and evaluator reliability, no job evaluation plan is error-free. Therefore, the need for some formal appeal or review mechanism within the plan is well recognized in the literature. Particularly in light of the sample unions' preference for unilateral administration of the job evaluation plan, it appeared critical to have some channel of recourse for an employee or the union if either believes that a position has been wrongly valued. All the sample organizations have incorporated an appeal mechanism into their plans. BC Hydro and UBC both employ in-house appeal committees, although UBC also utilizes the grievance-arbitration process; BC Tel relies on the grievance-arbitration route exclusively.

The relative advantages of an in-house appeal committee versus a third party adjudication (e.g., arbitration) system depend on the particular organization circumstance. For example, BC Tel's policy of maximizing control of pay decisions may be an incentive to avoid third party adjudication by resolving disputes before they go to arbitration. In fact, an exceptionally low number of disputes have been arbitrated. Therefore, an in-house appeal body may be superfluous, and not necessarily any more cost-effective or expedient than arbitration. On the other hand, the existence of the high number of outstanding classification disputes at BC Hydro suggest that an in-house appeal system is a far more economically viable dispute resolution process than would be true of arbitration. Unfortunately, it is difficult to isolate the effect the accessibility of the appeal committee may have on actually encouraging the pursuit of appeals (i.e., the existence of the appeal committee may create the demand for it). The joint appeal committee format, provided for in the Hydro/OTEU, appears to have both management and union support. However, the appeal process, itself, has been extremely costly and time-consuming and has been incapable of handling the volume of appeals effectively. Therefore, although the appeal format appears ideal, in terms of fairness and democratic representation, the process, itself, has not proven
to be practical.

CUE suggests that the in-house appeal committee within UBC is an unnecessary and ineffective step in the dispute resolution process. Unfortunately, figures indicating the number of disputes that are resolved at the appeal committee stage versus those that proceed to arbitration are not available. Therefore, it is difficult to assess the validity of CUE's argument. Certainly, UBC's relatively high arbitration figures, particularly in comparison with BC Tel's, suggest that an in-house appeal body, if it served as a deterrent to arbitrations, would be of benefit to both parties. Regardless of the method utilized, it was apparent from the study sample that an appeal process was an integral vehicle for the union's right to challenge management decisions regarding job evaluation and, hence, a key component of a job evaluation plan.

Information Accessibility

Research has indicated that full accessibility of information to all parties is not commonly found in job evaluation plans, although labour's position has been that full information accessibility is mandatory in order for union's to adequately monitor plan administration. Certainly, information accessibility was perceived, by the sample unions, to be an important component of a job evaluation plan. All the unions had general concerns regarding the subjectivity of the plan and OTEU and CUE, in particular, historically have had suspicions of plan manipulation and application inequity. The inherent mistrust had been fuelled by plan secrecy and the purposeful withholding of information on the part of management. To alleviate suspicion and enhance the union's position to monitor the plan, provisions which ensure, at the very least, that the union is informed of new classifications and the dispositions of reclassification reviews, as well as the rationale for the valuation of each, have been negotiated into all the sample Collective Agreements. Therefore, the sample unions are privy to more information than research has determined to be the norm. The
level of information accessibility was satisfactory to CUE and TWU, and appeared to be quite acceptable to UBC and BC Tel management as well. BC Hydro representatives, however, suggested that the plan mandate (introduced by OTEU) of being a completely open system was incompatible with a complex methodology. Full exposure to the plan, it was believed, actually created more confusion because employees simply could not understand the methodology. It is doubtful that OTEU would agree to a restriction on the release of information. Therefore, more comprehensive education programs may be of benefit to enable the employees to better interpret and understand the current level of information to which they have access.

Administrative Control

The importance of effective administration of the job evaluation plan is certainly recognized, by both practitioners and theorists. Henry Sargent, a principal of the Hay Group, writes "...a questionable system properly administered produces much better results than a fine system which is poorly administered."54 Researchers cite centralized coordination of the plan and regular plan "audits" as two administrative factors necessary for plan effectiveness. All the sample plans had been administered, several years ago, in a somewhat decentralized manner. However, problems with inconsistency and inequity led each firm eventually to centralize the plan administration. Currently, therefore, job evaluation is centrally coordinated through a separate division under the auspices of Personnel or Industrial Relations in all the firms.

Both BC Tel and BC Hydro/OTEU provide for periodic reviews or audits of all the positions in the bargaining unit. In the case of BC Hydro/OTEU, the plan incorporates a three-year review, which would involve over one thousand positions annually. Because of the current backlog of appeals, however, the review process has not, as yet, actually been implemented. Within their stipulated five-year review cycle, approximately 700 BC Tel
positions are evaluated annually. Regular audits of all the positions are recommended by researchers, and are believed to be a key component of plan effectiveness by BC Hydro's representative, who maintains that such audits would ensure flexibility and serve as a check of plan accuracy. BC Tel's representative also suggests that keeping the classifications current, through a regular audit, is particularly important in light of the rapid changes in the type and division of labour within today's work force.

UBC was the only organization that did not provide for a periodic review of the classifications. Rather, wage disparities and obsolescence of classifications are rectified as the need arises, as was the case with the 1982 Salary Equity Program. UBC's representative believed that the positions were always being informally reviewed, by virtue of the comparative process of the classification methodology. Although this process does not strictly meet researchers and practitioners recommendations for a cyclical audit, UBC's environment may be static enough for ad hoc reviews and adjustments to adequately meet their needs.

Despite the obvious benefits of a regular plan audit, it is an onerous task, particularly for large organizations where hundreds of positions may have to be reviewed annually. Despite the differences in job analysis procedures and evaluation methodologies, all sample organizations had concerns with the dilatoriness of the evaluation process. Provisions for a regular audit of the positions creates an even greater need for an efficient and expedient process. The excessive time involved appears to be a management concern only, as none of the unions perceived it to be a problem. The unions' lack of concern may be due to the existence of contractual provisions guaranteeing retroactivity of salary changes to the date the request was submitted. Therefore, employees would not suffer a loss of salary as a result of tardiness.

An extraordinary amount of time is invested in the job analysis and evaluation process. For example, BC Tel's staff of five processes approximately eighty reclassification requests
per year, only (albeit, in addition to other duties, such as conducting wage survey, performing the cyclical audit, etc.), while the Compensation Division at UBC handles roughly half that number, on average. Figures for the volume of reclassifications processed within BC Hydro are not available because, as one Hydro representative conjectured, the organization has been in such flux since the implementation of the plan it is impossible to determine what the "average" work flow would be. Nevertheless, Hydro representatives shared the other management representatives' desire to expedite the process. In addition to the time investment required for the evaluation methodology, Hydro's appeal procedure, as discussed earlier, is also very time-consuming. Management is endeavoring to resolve the delay by negotiating provisions into the plan which would ease the logistical problems of involving so many parties in the appeal process. Even if negotiations are successful at alleviating these problems, the methodology remains complex and time-consuming.

Common to all the sample methodologies, and all traditional methodologies, in fact, is the process of translating descriptive information into comparative, quantitative data in accordance with pre-determined arbitrary scales of value. One of the limitations of traditional methods of job analysis and job evaluations, therefore, is that, by virtue of the subjective nature of the translation process, very little of the process can be automated. Therefore, the only ready means of accommodating to increased volume of job and classifications changes is by increasing the manpower.

As the inability of traditional plans to meet today's dynamic labour force needs has become more apparent, researchers have been focusing their attention on devising methods that could keep pace while maximizing accuracy and reliability. As a result, a variety of new job analysis methods and some alternatives to conventional job evaluation have been developed. The thrust of much of the research has been towards developing "structured questionnaires", i.e., lists of specific questions soliciting objective information and/or scaled responses, which are then used to describe the position. The responses are in a quantitative
format so that the common responses can readily be statistically compared. The Critical Incident Technique, which identifies actual job behaviour, the Job Analysis Questionnaire, which identifies job task, job knowledge and job environment items and the Functional Job Analysis Method, which focuses on worker functions in the context of organizational goals, are all examples of recently developed job analysis techniques. The Factor Analysis Calculation Technique System (FACTS) is an example of a fully computerized job evaluation system developed by correlating objective factors (e.g., education, wage bill of those supervised, organization level, etc.) using multiple regression to devise a mathematical relationship between job factors and existing salary. Perhaps the most popular computerized system today is the Position Analysis Questionnaire (PAQ), which is comprised of 194 items on a standard questionnaire that can be used to compile a profile of any job and rank it relative to others within the organization. The PAQ method is standardized and can be readily administered to heterogeneous groups and thus has the appeal of reliability and applicability.

A computer-based system, such as PAQ, is an expedient means of gathering, evaluating and recording information which may be capable of resolving the sample organizations' concern with process inertia. Not only would such a system be capable of handling a high volume of position classification changes, but it would also enable continual monitoring of positions to ensure classifications are kept current. The potential advantages of computer-based systems in terms of accuracy, reliability and administrative efficiency and expedience are commonly recognized. However, because it is a much more impersonal process, a computer-based system may create low face validity of the plan, and may exclude employees from any understanding of the relationship between their job and their pay. Furthermore, the evaluation results, by virtue of their having been derived from an employee completed questionnaire that is analyzed by computer, may be "above reproach", i.e., non-appealable. It is unlikely that an employee, or more importantly, a union would be willing to relinquish the
right to challenge pay decisions.

Nevertheless, it is apparent from the common concern shared by all the management representatives in the study, that administrative and process efficiency and expediency is an important criterion of job evaluation plan effectiveness.

**Equal Pay for Work of Equal Value**

As noted in Chapter I, the flurry of academic interest in job evaluation had largely subsided by the mid-1950s. Within the last decade, however, research has been renewed with specific attention paid to the role of job evaluation in the issue of equal pay for work of equal value. Because of the current social and legislative emphasis on this issue, it was hypothesized, at the onset of the study, that equal pay for work of equal value would be a common consideration of job administrators and unions. In fact, it appears from the sample that comparable worth remains more of a philosophical than a practical consideration in the administration of job evaluation plans.

Only CUE, as a self-proclaimed feminist union, identified achieving equal pay for work of equal value as a fundamental goal of the union. The Union representative has concerns that this goal cannot be met applying the existing UBC job evaluation plan, because of the inability of the classification methodology to compare dissimilar jobs. It is also CUE's concern that its bargaining unit, as a whole, which is predominately female and performing traditional female work, is subject to wage discrimination. Therefore, the job evaluation plan, which focuses on maintaining internal relativities, is seen to perpetuate the discrimination. Furthermore, the classification methodology is particularly vulnerable to cultural bias and sex-role stereotyping because it is an assessment of the value of a job, as a whole, to the organization or, where external parity is taken into consideration, to society. Because of the highly subjective nature of the classification method and its inability to methodically compare dissimilar jobs, the classification method is generally regarded as the
least effective means of determining equal pay for work of equal value. The UBC representative recognizes the plan's limitations with respect to the issue of comparable worth, and is contemplating how best to accommodate the principle in the future. However, neither the Union, nor human rights legislation have exerted sufficient pressure to catalyze UBC's immediate implementation of another methodology.

The point factor method, applied by BC Hydro and BC Tel, is capable of measuring dissimilar jobs. However, this capability does not preclude wage discrimination from occurring in point factor evaluation plans. Donald Trieman, in a comprehensive and highly acclaimed report to the National Academy of Sciences, Committee on Occupational Classification and Analysis, points out discriminatory weaknesses in seemingly objective plans. He notes that a job evaluation plan will frequently be tested for reliability by comparing its results against existing pay rates. Therefore, a system will be deemed accurate if it can replicate existing pay discriminations. Benchmark positions reflecting labour market pricing (particularly those benchmarks established many years ago when pay discrimination was far more prevalent) may perpetuate labour market bias throughout the whole system. Furthermore, the choice of factors and their relative weights may incorporate a bias that adversely affects women or minorities. Studies on job demands and working conditions faced by men and women indicate distinctive trends which could bias certain factors. For example, male jobs "typically" involve full body movement while female jobs tend to involve repetitive and confined use of only a few muscles; men generally work in noisy and dirty conditions, while women tend to work in small spaces and with "white noise" and poor lighting. The Physical Effort and Job Conditions factors of the BC Tel plan (which was developed during the post-War period) place value on lifting and working in a dirty environment, for example, yet do not recognize physical discomfort associated with typical clerical jobs, such as eye strain from close visual work, visual display terminal use, etc., and neck and back pain from prolonged typing, data entry work, etc. These factors exemplify
subtle biases that can discriminate against female workers. The issue of equal pay for work of equal value is not a priority within TWU, so that although the Union recognizes the potential discriminatory effect of the two factors, it does not regard the plan, in general, as being inherently discriminatory.

The BC Hydro/OTEU plan, which is the youngest of the three plans, does not measure physical effort at all, and has a much broader scope when measuring working conditions (including poor lighting and cramped work space). Although achieving equal pay for work of equal value was not a Union issue at the time the plan was developed, one of the OTEU representatives (who does see it as an important issue today) is satisfied that the plan has facilitated pay equity within the bargaining unit. One of the Hydro representatives does not see equal pay for work of equal value as a primary objective of the plan, but concurs with the Union representative in that, by virtue of the plan's function of measuring dissimilar jobs, it does further the issue of comparable worth. OTEU has also actively pursued pay equity through collective bargaining, by negotiating adjustments to the wage schedule which, in essence, increased the minimum wage.

Pursuing equal pay for work of equal value through job evaluation is a controversial issue. Many employer organizations are opposed to wage setting through job evaluation rather than through labour market dynamics. As well, the general labour trend locally has been to negotiate pay equity collectively, as in the case of OTEU, rather than through individual pay adjustments. For example, in 1981, the Vancouver Municipal Regional Employees' Union (VMREU) and the Canadian Union of Public Employees (CUPE) pursued the concept of equal pay for work of equal value as a major issue in a protracted strike against the Greater Vancouver Regional District. They endeavored to achieve comparable worth by setting base rates of indoor (clerical) workers at the same level as those of outdoor (laborer) rates. Although they were unsuccessful in their bid, the strike did bring attention to the issue of comparable worth.
Despite employer apprehension about the feasibility and projected costs of achieving equal pay for work of equal value through job evaluation, in reality the pressure from labour and/or legislation to do so has not been that strong. For instance, of the sample organizations only BC Tel was subject to legislation enforcing equal pay for work of equal value, under the Federal Human Rights Act. In comparison, The British Columbia Human Rights Code legislates equal pay for equal work, only. The federal Act, which was established in 1977, is enforced by the Canadian Human Rights Commission, in a reactive manner, by investigating all formal complaints of pay discrimination. The investigation process involves, firstly, establishing that the complainant's job is performed primarily by women and that the job that is being used as a comparison is performed primarily by men. If this is the case, both jobs are evaluated by a Commission job analyst, using the Aiken plan, which is a nine factor point rating system. The assessment is on the basis of skill, effort, responsibility required and the conditions under which the work is performed, without reference to the marketplace values of the jobs. If the complaint is deemed to be legitimate, the matter is referred back to the parties (management and the union) to rectify the discrimination. The objective of the Commission, while ensuring pay equity, is to minimize third party intervention and maximize management and labour input into wage setting. During the period 1978 to 1983, only sixty complaints were launched, the majority of which were dismissed.61

The BC Tel representative believes that differentials resulting from its job evaluation plan comply with the Human Rights Act, and that achieving equal pay for work of equal value is not an onerous requirement. Although the BC Hydro/OTEU evaluation plan is not subject to legislation, representatives of both parties are confident, as well, that their plan is not discriminatory. Therefore, it is only the UBC plan that causes concern to both Management and Union, with respect to its inability to adequately measure comparable worth.
CHAPTER VII
CONCLUSION

As is evident from the preceding chapters, each of the three job evaluation plans sampled exhibited particular strengths, as well as weaknesses. Certainly, no one plan mirrored the "model" plan. Because of the situational variability of each plan, it is not feasible to assess which is the overall, comprehensive "best" plan. However, it is feasible, and fruitful, to measure each plan against the prototype, as well as, to assess the effectiveness of each plan in meeting their particular situational requirements.

Of the three sample plans, the UBC plan appeared to deviate the farthest from the "model" plan. For example, the UBC plan simply "evolved", as opposed to being systematically developed in response to clearly articulated management goals. The plan was established and, is now, administered unilaterally, as opposed to having joint union-management participation in the development and administration process. The plan applies a classification method, which is vulnerable to subjectivity and ambiguity. Additionally, the Union is dissatisfied with the limitations of the classification method vis a vis its goal of achieving equal pay for work of equal value. The plan does not provide for a regular review or check of the evaluation results nor does it incorporate an "exclusion" provision to measure, separately, those jobs that do not have a ready comparison within the bargaining unit. Finally, introducing market rates for select positions has appeared to have created an imbalance between internal equity and external parity, distorting the upper range of the payscale.

Nevertheless, the plan also displays distinctive strengths which appear to offset, considerably, the weaknesses. For example, mitigating the lack of technical sophistication of the plan is Management's (Compensation Division) emphasis on the perceived fairness of the plan. To this end, an independent evaluation decision-making body (the Reference
Committee) is maintained and the opportunity for appealing a decision is provided through both an in-house appeal committee and the grievance-arbitration process. Credibility is further enhanced through full information accessibility for all parties. Additionally, although the classification method is criticized, generally, for its lack of concrete measurement standards, arbitrators' decisions have supported UBC's standards and the consistency with which they have been applied. Effective analyst staffing and training appear to contribute to the consistency and soundness of plan application.

The inability of the classification method to measure dissimilar jobs is also perceived, by scholars, to be a weakness of the methodology. However, because CUE is a relatively homogeneous occupational group, there is not a pressing need for a more sensitive measurement tool and, hence, the classification method is not inappropriate for UBC's work force. Nevertheless, the apparent distortions in the pay structure, as a result of tensions between internal equity and external parity, indicate a need for an exclusion provision to facilitate separate measurement of those few unique jobs (e.g., Computer Operator) which have no ready internal comparisons. An exclusion provision would allow for a balance between internal equity and external parity, as well as, maintain the integrity of the plan measurement standards. This limitation of the plan is compounded by the lack of a formal review process, although sporadic reviews have alleviated problems somewhat. Regardless of the stability or homogeneity of UBC's organizational environment, a regular audit of the classification structure should be incorporated into the plan as a system safeguard against persistent inaccuracies and paygrade distortion.

Despite the limitations, the job evaluation plan appears to be satisfactorily meeting UBC's needs and has Management acceptance. Certainly, its relative simplicity, ease of administration and budgetary fit are appealing to management and the plan is perceived, by the UBC representative, to meet his goal of fairness. CUE, on the other hand, expressed concerns with the subjectivity of the methodology and dissatisfaction with the plan,
generally. Yet, no formal action has ever been taken, by the Union, to instigate changes to the job evaluation plan, leading one to assume that it is not a high priority issue for CUE. Therefore, with the weaknesses of the plan offset, somewhat, by the strengths and with the Union seemingly lackadaisical, there is simply no pressure on Management to implement changes to the plan. Although some potentially serious flaws exists, it would appear that the UBC job evaluation plan is meeting the current situational requirements.

The BC Tel job evaluation plan represents quite a different perspective than that of the UBC plan. Management has, from the onset, focused on the value of the job evaluation plan as a technical management tool. It is an exemplary plan in many ways: it was methodically developed to meet specific management needs, the point factor method (incorporating an exclusion provision) is applied, a regular audit of the classifications is undertaken, an appeal mechanism is established using the grievance arbitration process, and the wage/classification structure is rational and balanced. The plan has full management support and is perceived, by management, to be extremely effective at what it is intended to do: measure job value.

Nevertheless, BC Tel's experience exemplifies the fact that, realistically, job evaluation can no longer be considered as an exclusive management tool, to be applied unilaterally and without consideration of those parties (i.e., employees and the union) it is affecting. Therefore, although the plan is effectively meeting Management's needs, it has not achieved Union acceptance, because of concerns regarding specific factors and factor weightings. The historical labour relations difficulties together with Management's unwavering goal of maintaining full control of pay decisions (including the job evaluation plan and all information regarding the plan) has precluded bilateral modifications to date. However, the recent improvement in the industrial relations climate appears to be facilitating greater Union involvement in the plan. Currently, the plan seems both technically and administratively sound, effectively meeting the needs of Management. Conceivably, having input into factor selection and weighting will enable the Union to shape the plan to its needs, thus
encouraging Union acceptance of the plan as well.

BC Hydro's experience is significantly different from that of both BC Tel and UBC. As the only bilaterally developed plan in the sample it certainly does not suffer from lack of Union acceptance as do the other two plans. On the contrary, one of the strengths of the plan is Management's and OTEU's mutual acceptance of the measurement criteria (i.e., the factors and factor weightings). Like the BC Tel plan, the BC Hydro/OTEU plan exhibits several exemplary features: bilateral development, complete information accessibility, an in-house appeal mechanism, a regular audit of classifications, sound methodology (i.e., the point factor system) and a rational pay structure. However, serious flaws with respect to the administrative inefficiencies and costs of the plan threatened to undermine its effectiveness. Management's role throughout the development and installation phase does not appear to have been sufficiently purposeful or directed to have established a plan that would effectively meet its present and future needs. Although both parties agree on the measurement standards, the technical complexity of the plan defies ready employee comprehension. In contrast to BC Tel and UBC, the BC Hydro/OTEU has full Union acceptance, however, it falls far short of meeting Hydro's needs and achieving Management acceptance.

In terms of a general assessment of the effectiveness of their respective job evaluation plans, the UBC and BC Tel representatives indicated satisfaction with their plans, while the Hydro representatives voiced certain dissatisfactions. OTEU, on the other hand, expressed satisfaction, with CUE and TWU expressing ambivalence, at best. Of note, however, is the observation that there were few common management criteria for plan effectiveness. For example, employee acceptance was perceived by the UBC representative to be a key measure of plan effectiveness, while the BC Tel representative disregarded employee response, maintaining that analyst acceptance and the accuracy of the evaluation results, per se, were more appropriate indicators of plan effectiveness. The grievance/arbitration rates resulting from the job evaluation plan were not, generally, regarded as an accurate measurement
criterion. UBC’s representative believed that the disposition of the arbitrations was a more important standard than the arbitration rates, per se. He also believed that the frequency with which the plan was brought to the negotiating table provided a measure of acceptability and effectiveness. Both the UBC and BC Tel representatives cited durability as an indicator of plan effectiveness. All the unions, on the other hand, appeared to assess the plans in terms of fairness and consistency, primarily, and, in some cases, comprehensibility and openness. None of the parties incorporated a regular assessment of the plan into the administration process and, certainly, no one maintained quantifiable or even clearly articulated criteria for measuring the effectiveness of the plan. Rather, the assessment of the plan was more anecdotal and seemed to reflect the particular management approach or philosophy towards job evaluation. For example, UBC, which regarded employee acceptance as an indicator or plan effectiveness, maintained that an important goal of job evaluation is that it is perceived to be fair by the employees. In comparison, BC Tel represented an applied measurement approach, where the goal of the plan is to produce valid job measurements and rankings without consideration to any contextual issues. Accordingly, that plan is assessed on the basis of the accuracy of the evaluation results only. There was no evidence that BC Hydro had established any specific approach to the plan initially, and now it appears to be measuring plan effectiveness, primarily in terms of costs.

Despite the noticeable absence in this sample of universal criteria for assessing job evaluation plan effectiveness, it is possible to synthesize a measurement "checklist" on the basis of common concerns and experiences observed in the study. Admittedly, the following checklist falls short of the rigours of a quantitative measurement; however, it may provide a practical guide for unionized organizations when developing new plans or assessing their current plans. Therefore, in endeavoring to measure the suitability and effectiveness of the job evaluation plan, both management and labour should take into consideration the following points:
1. **Goals of the job evaluation plan**
   a. Have the goals and purposes of the plan been clearly articulated?
   b. If the plan is established, are the goals reviewed periodically for currency and to ensure the plan remains goal focused?

2. **Senior Management Support**
   a. What level of senior management support does the plan have?
   b. Is this level of support compatible with the scope and costs of the plan?

3. **Terms of Reference**
   a. Do the provisions within the Collective Agreement allow satisfactory management control over the job evaluation plan and the classification structure?
   b. Do the provisions empower the union to satisfactorily monitor the plan?
   c. Do provisions exist to facilitate joint discussion of changes to the plan itself?

4. **Evaluation Method Suitability**
   a. Is the evaluation method suitable to the work environment (e.g., dynamic versus static)?
   b. Is the method capable of measuring the diversity of occupations within the organization's work force?
   c. Is there an exclusion provision in the event the method cannot balance internal equity and external parity?

5. **Evaluation Method Soundness**
   a. Are the measurement standards logical, objective (as possible) and free from bias?
   b. Do the standards reasonably represent all common job elements?

6. **Evaluation Consistency**
   a. Are the job analysts provided with adequate training?
   b. Does the tenure of the job analysis staff facilitate evaluation consistency over time?
   c. Are comprehensive evaluation procedural records and guidelines maintained for reference purposes?
7. **Checks for Accuracy/Objectivity**
   
a. Is there an appeal mechanism in the event of a challenge to an evaluation result?

b. Does the appeal disposition record reflect positively on the evaluation soundness?

c. Are the positions/classifications reviewed on a regular basis?

8. **Plan Credibility and Comprehensibility**
   
a. Is there full information accessibility regarding the job evaluation plan and the evaluation decisions?

b. Does the level of employee/supervisor familiarization with the plan facilitate their full understanding of it?

9. **Administrative Efficiency**
   
a. Is the plan capable of producing the required volume of evaluations within a satisfactory period of time and at an acceptable cost?

10. **Wage/Classification Structure Rationality and Practicality**
    
a. Are the paygrade differentials equitable?

b. Does the number of paygrades allow for adequate differentiation between jobs without limiting management's ability to organize the work?

c. Is the structure conducive to promotional moves and, conversely, employee mobility in the event of work force reduction?

From the experiences of the sample plans, one can infer that a job evaluation plan will exhibit stability, suitability and effectiveness if it rates positively against the preceding ten checkpoints.

As discussed, a checklist approach may be of practical benefit; however, further research should be pursued to enhance our understanding of the relative importance of the factors of a job evaluation plan as well as the interactive effect of these factors. The limitations of the case study methodology, in terms of applicability of results, were acknowledged in an earlier chapter. Nevertheless, these results can serve as a springboard for more generalized research. For example, the factors observed to affect the job evaluation plan in this sample can serve as a framework for a survey of the experiences of a
far larger sample of plans. With a larger sample, correlation between factors and the parties' subjective assessment of their plan effectiveness may become more meaningful. Furthermore, although there was an historical component to this study, more comprehensive longitudinal studies may provide valuable insight into the durability and adaptability of job evaluation plans through observing the effects of the various factors on plans over time. Although employee acceptability was not unanimously regarded as a criterion of plan effectiveness, studies of employee and supervisory perceptions of job evaluation may, nevertheless, be worthwhile, providing feedback for plan development and administration.

Despite the limitations of this study, the observations of the multiplicity of job evaluation plans clearly support the institutionalist perspective. Certainly, the accuracy of results is an important factor, however—in contrast to the singular approach of the applied measurement perspective—evaluation validity is only one of several factors which determine the effectiveness of job evaluation plans. Of particular importance is the growing union interest in job evaluation and, to a lesser extent, comparable worth, which has expanded the scope of plans. Traditionally, job evaluation has been exclusively a management tool supplementing wage determination. Now, job evaluation and the goal of ensuring internal equity are of equal interest to management and labour. Drawing job evaluation into the industrial relations arena introduces new and instrumental variables into the equation for plan effectiveness. However, insofar as labour and management share a common goal for job evaluation, the potential for increased sophistication and effectiveness of plan development and administration is great. Conceivably over time, management and labour—through negotiations, joint reviews and even confrontations—can maximize the effectiveness and acceptability of job evaluation within their own organization, and industry as a whole. It is hoped that continued research into the contextual influences on job evaluation will assist this process.
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4 Ibid., p. 48.


9 Martin Wolf, "Solving Technical Problems in Establishing the Pay Structure," *Handbook of Wage and Salary Administration*, p. 20/6, suggests utilizing a temporary "market premium" that would reflect market fluctuations as they occur as opposed to making permanent changes to the wage structure through classifications.


11 Ibid., p. 86.


27Ibid., p. 86.


37Ibid.
First line supervisors had been used as management representatives on previous review committees, however, because of their lack of job evaluation experience, the company believed evaluation specialists were more effective representatives.

TWU and BC Tel. Agreement Between, p. 180.


Ibid.


The Association of University and College Employers, Local 1 (UBC) and the University of British Columbia, Agreement between. 01 April 1982, p. 35.

Office and Technical Employees' Union, Local 378 and the British Columbia Hydro and Power Authority, Agreement between, 01 April 1983, p. 12.


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Canada, Greater Vancouver Labour Market Survey.

OTEU and BC Hydro, Agreement between, pp. 80, 87.

International Labour Office, Job Evaluation, p. 86.


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APPENDICES
APPENDIX A
INTERVIEW FORMAT

HISTORY:
- How long has this plan been in effect?
- What was in effect prior to this plan?
- How did this plan come about?
- Have any modifications been made to this plan since its implementation?
  If so, why?

CHARACTERISTICS OF PLAN:
- What are the terms of reference? (i.e., Collective Agreement, Letter of Understanding, binding plan manual)
- Is the plan bilaterally or unilaterally administered? Why?
- What type of evaluation method is used? Why?
- What factors are being rated? Why?
- Who are the raters? What is their background?
- How is the job analysis translated into monetary values?
- What recourse for appeal exists? Why this particular method?
- What provisions exist to enable the plan to accommodate to technological and/or significant economic change?
- How much information regarding the job evaluation process is disclosed to the employee and the union? e.g.,
  - the job description and evaluation recommendations
  - the job evaluation decision and rationale
  - the appeal disposition and rationale
- Who is responsible for educating the employee in the plan process and how is this done?
- Is there centralized coordination of the plan? If no, how is the plan coordinated?
- Is a regular review/audit of the job classification structure built into the plan? Why or why not?
- What relationship does job evaluation have with other provisions in the Collective Agreement? e.g.,
  - hiring, transfer, promotion, demotion
  - lay-offs
  - management rights, re; organization of work, contracting out

**SITUATIONAL NEEDS AND OBJECTIVES:**

What purpose(s) was the plan originally intended to serve? e.g., checklist

- to improve/rationalize wage structure
  (simplify; equalize pay differentials; increase/decrease number of classes; control relationship between rates and work)

- to establish mechanism for correcting wage anomalies and setting rates for new jobs

- to maintain consistent wage policy

- to provide documentation for wage negotiations

- to improve industrial relations climate

- to compile job analysis information for:
  - staffing; training; basis for performance evaluation; safety programs; work flow planning; human resources inventory;

Is the plan still intended to serve the same purpose?
If not, what purpose is it currently intended to serve?

How would you describe the level of top management/union executive support of the plan? How is that demonstrated?

What are the more encompassing interests/policies to be served by the plan? e.g.,

**Management:**
- to maintain control of the wage structure
- to maintain unilateral control and flexibility in organizing the workplace
- to maintain external parity (recruitment purposes)
- to enhance labour relations environment and employee satisfaction
- to implement an equal pay for work of equal value principle

**Union:**
- to jointly determine wage structure
- to jointly determine and control organization of the work place
- to maintain contractual definition of work assignments
- to maintain/increase union position at bargaining table
- to implement an equal pay for work of equal value principle
Has the plan ever been assessed in terms of its effectiveness and acceptability? If so, what were the results?

What criteria were used (or would you use?)

What do you perceive to be the strengths and weaknesses of the plan?

How can the plan be improved?

ENVIRONMENTAL FACTORS:

How has "budget restraint" been manifested in your organization?

Has this impacted on the job evaluation plan? If so, in what way?

Industrial Relations Climate:

How would you characterize, in general, your relationship with union/management?

(Supplemented with the provision of the following statistics:
- the strike rate in the past ten years
- the number of grievances and arbitrations filed in the last ten years
- the number of grievances and arbitrations, with respect to job evaluation, filed in the last ten years
- the number of joint union-management working committees in effect)

Are there any other factors which effect the job evaluation plan, which we have not discussed?
ARTICLE 31 - JOB DESCRIPTIONS, JOB EVALUATION AND RECLASSIFICATION

31.01 Job Descriptions

The current approved Job Descriptions shall be the recognized standard descriptions of each classification. Revised or new Job Descriptions and/or Pay Grades will not be implemented until accepted by the Union.

Written notice of objection must be given by the Union within sixty (60) days of receipt, or such descriptions shall be considered accepted.

31.02 List of Job Duties

(a) Each Department Head is responsible for drawing up a position description identifying a list of tasks or duties for each position in the department. This list shall serve as an outline of the work to be performed by the incumbent.

(b) The employee shall be requested to draft her/his list of tasks or duties for the assistance of the Department Head in establishing the requirements of each position. Before such list (or amended list) is established as complete, the employee shall sign it, to signify that she/he has been given the opportunity to read the list and make final suggestions. When signed by the Department Head or designate, the list (or amended list) shall become official.

(c) Lists of tasks or duties may not be all inclusive, but all work performed within an individual position must be consistent with the terms of the standard Job Description of the classification.

(d) The Official List of Job Duties shall not include "preferred qualifications* or such phrases as: *all other duties as required*, and "assists with more advanced clerical duties", and *to act as a deputy for more senior staff members*. (However, the phrase "performs duties related to the qualifications and requirements of the job* is permissible.) Nor shall they conflict with any terms of this agreement. The Union, the University Employee Relations Office and the employee concerned shall each receive one (1) copy of the Official list or Official amended list.

31.03 Job Evaluation Committee

The Union shall establish a Job Evaluation Committee and inform the University of its members. The University shall recognize this Committee and shall communicate with it in regard to any problems and proposals concerning job evaluation and classification that the Committee wishes to draw to the University's attention.

Upon request, the University will provide the Union with all information relevant to the review of a classification and its evaluation.
31.04 Reclassification Procedure

(a) Request for reclassification may originate with the employee, the Union or the department head. A minimum of six (6) months must elapse between each application on an employee's behalf. These requests must be made in writing to the Employee Relations Department, with one (1) copy of such requests sent to both the Department Head and the Union.

(b) The Department of Employee Relations shall have the case reviewed with the employee. The Reclassification procedure must include the following:

(i) The employee shall complete a reclassification form, a copy of which shall be sent to the Union office. This form shall be designed to obtain all relevant information related to the request, including:

(1) the duties and responsibilities the employee is fulfilling, which she/he thinks justify a change in classification, and

(2) the amount of retroactivity (if any) to which the employee feels she/he is entitled in accordance with Article 31.05.

(ii) The employee shall be interviewed by a job analyst. At the request of the employee, a steward shall be present at this interview.

(c) The employee shall be notified by letter, within eight (8) weeks of the date Employee Relations receives the employee's completed reclassification form referred to in (b) (i) above, of the decision regarding the request. If the reclassification is not recommended, the letter shall contain the reasons for not recommending the reclassification. A copy of the aforementioned letter shall be forwarded to the Union.

(d) If the employee is not satisfied with the decision, she/he shall have the right to the established grievance procedure, beginning with Step 3.

(e) If an employee's position is reclassified, that employee shall not be placed on probation or be considered to be on a training period.

31.05 Wage Increase Awarded Through Reclassification

A wage increase awarded as a result of reclassification shall be retroactive to the date of change of job duties or, when no date can be established, retroactive to the date of written request for reclassification. The employee shall be placed on the step in the classification which ensures an increase in salary.

31.06 Wage Increase Awarded Through Misclassification

Where the position does not entail new job duties and has, in fact, been misclassified since date of hire, the employee shall be placed on the same seniority step in the appropriate classification as she/he was on in the original job classification, and shall receive full pay rate adjustment retroactive to date of hire, except where date of hire is prior to July 1, 1981, in which case, pay rate adjustment shall be retroactive to July 1, 1981. On April 1, 1983 this date shall read July 1, 1982.
APPENDIX C
BC TEL/TWU COLLECTIVE AGREEMENT

ARTICLE 7—JOB CLASSIFICATIONS AND JOB EVALUATION

1. The Company shall provide the Union with copies of the evaluated job descriptions for each employee or classification for whom the Union is certified as the bargaining agent. The Union shall be supplied with sufficient information for it to know the basis of each job's classification and the rationale for its grouping. The Company shall notify the Union in writing of any additions, changes or deletions of job classifications prior to the effective date.

2. Within 30 days of establishing a new clerical classification the Company shall furnish the Union office with a job description, the appropriate grouping and substantiation of factor ratings.

3. Re-evaluation may be requested only where there has been a change in duties. In the re-evaluation of positions, revised job descriptions, groupings and substantiation of factor ratings shall be furnished within 60 days of the re-evaluation being initiated.

A wage increase awarded as a result of a re-evaluation initiated by an employee, shall be retroactive to the date of written request for the re-evaluation.

4. The Company will provide for joint consultation with the Union on new job classifications prior to their implementation and on re-evaluations during the review procedure, provided such consultation will in no way delay or hinder the Company's right to fill new job vacancies.

Any differences that cannot be resolved will be referred to arbitration as set out in Paragraph 5.

5. If the Union determines that a grievance exists, they shall notify the Industrial Relations Department. Within 30 days of receipt of this notification, the Union and a representative of the Industrial Relations Department shall meet and attempt to resolve the grievance. If no agreement can be reached, the grievance shall be referred to arbitration within 60 days.

In the case of a re-evaluation, it shall be referred to an arbitration board, or by mutual agreement a sole arbitrator, as provided by Article VIII, Paragraph 2—Arbitration, having the authority to determine the correct wage grouping, consistent with an appropriate application of the established job evaluation plan.

In the case of a new job classification, arbitration shall involve a sole arbitrator agreed upon by both parties. This sole arbitrator will also have the jurisdiction to determine whether the new job classification can be properly evaluated under the job evaluation plan and, if not, establish a wage rate for such classification.

The decision of the arbitration board or sole arbitrator shall be final and binding on both parties and the cost of the arbitrator or board chairman will be shared equally between the Company and the Union.

6. In the event that a re-evaluation downgrades a job into a lower group, any incumbent in that classification shall not have his wage rate reduced, but shall continue to receive all incremental and negotiated raises as they become due, subject to the restriction that it is understood that downgraded employees will apply for posted vacancies in a related work function and/or same wage grouping at their former wage rate or higher within the same village, town, city or municipality. If a downgraded employee has chosen not to apply for two such job postings, he will thenceforth be frozen at the same wage rate until the lower group equals or is higher than the rate he is receiving. Thereafter, he shall progress on the applicable scale in the lower wage group. When an employee has his wages frozen under the provisions of this paragraph, the Company shall forward the details in writing to the Union, including the posting numbers of the job vacancies involved.

7. An employee promoted to a new position shall be entitled to receive (upon request) a copy of the current job description for that position.
ARTICLE 2
JOB EVALUATION

2.01 The former Job Evaluation Task Force has recommended a new Job Evaluation plan which is to be implemented as per the following:

2.02 THE PLAN
(a) By 1 January 1982, the Parties shall either:
1. implement the Plan, or failing that
2. have agreed on an alternate date of implementation.
(b) This plan shall be the sole determinant of job groupings for employees covered by this Agreement except as outlined in Article 2.09.
(c) Plan job descriptions will be assigned to all employees within 12 months of implementation.
(d) Any aspect of the Plan or its administrative procedures may be changed upon approval of the Steering Committee.

2.03 JOB DESCRIPTIONS
(a) Hydro agrees that it will provide the Union with copies of all current job descriptions covering employees for whom the Union is certified as the bargaining agent.
(b) Hydro will provide to the Union descriptions of new jobs prior to their implementation, and no job will be bulletined until the Union has received a copy of the draft job description which substantially describes the job.
(c) A new job is defined for the purpose of this Article as:
1. A newly created job which has not previously existed, or
2. Any job within a section, the duties of which have not been performed by an employee within that section during the previous six (6) month period. Seasonal jobs, agreed training jobs and jobs which are part of a hierarchy within a section will not be considered as new jobs under this definition.
(d) When jobs are to be downgrouped the Union will be notified and given reasons in writing thirty (30) days prior to the effective date.

2.04 SALARY TREATMENT
(a) Once the new job evaluation plan is implemented, any subsequent changes in evaluations will be treated as follows:
1. upgroupings - Article 7.04(a)
2. downgroupings - Article 7.03(a)5.
(b) Salary treatment for employees on staff at time of implementation of new job evaluation system:
1. DOWNGROUPED EMPLOYEES
   Employees on staff as of the date of ratification shall receive full
protection under blue-circling salary treatment.

2. UPGROUPIED EMPLOYEES

All claims for retroactivity related to Job Evaluation are resolved as follows:

(a) Upon ratification of this Agreement incumbents of the jobs identified below and which were upgrouped subsequent to the Ad Hoc Committee studies will receive $50.00 per month of service in the job between 1 May 1978 and 1 August 1980:

(i) Jobs included in the District Distribution Estimators study.

(ii) Engineering Drafting jobs.

(iii) Gas Engineering Drafting jobs.

(b) Upon implementation of The Plan as provided in 2.02 above, incumbents of jobs where requests for job evaluation reviews were initiated after 1 May 1978, were not processed because of the joint freeze, are documented in the Job Evaluation Section, and where upgroupings are supported by Stevenson and Kellogg evaluation shall receive $50.00 per

2.05 STEERING COMMITTEE

(a) The Steering Committee will consist of the Union President, the Manager of the Labour Relations Division, (or delegate) and such other appointees as the Parties may from time to time consider appropriate.

(b) Costs incurred by the Steering Committee as described in (a) above shall be the responsibility of their respective principals.

(c) The terms of reference and specific objectives of the appointees referred to in (a) above will be determined by the Steering Committee.

2.06 JOB EVALUATION MONITORING AND APPEALS COMMITTEE

(a) The Job Evaluation Monitoring and Appeals Committee (JEMAC) appointed on 1980-04-25 shall consist of four (4) nominees from Hydro and four (4) nominees from the OTEU. In the event of the resignation of either Party's nominee(s), the nominee(s) shall be replaced within thirty (30) calendar days. There shall also be a standing chairman (arbitrator) appointed from time to time as required upon nomination and approval of the Steering Committee.

(b) Authority

1. To receive and to rule on appeals from employees, line management or the Union regarding the interpretation and application of the new job evaluation plan, factor levels, and/or description of job demands.

2. To recommend to the Parties administrative procedures required for JEMAC to effectively carry out its responsibilities. Such procedures shall be subject to approval by the Steering Committee and, if approved, documented in the JEMAC Procedures Manual.

(c) Procedures

1. JEMAC decisions shall be by majority vote of the voting members. Voting members, two (2) from Hydro and two (2) from the Union shall be selected by the Chairman in advance of each meeting.

2. All voting members of the committee shall cast a vote on all questions. Tied votes shall be resolved by the casting of a vote by the JEMAC Chairman (Arbitrator).

2.07 COST APPORTIONMENT

(a) JEMAC Chairman (Arbitrator)

1. The costs of the Chairman (Arbitrator) shall be shared equally by the Parties. Such costs shall include the following: Chairman's
(Arbitrator's) salary and benefits, secretary, travel and incidental expenses.

2. The shared portion shall be billed monthly to the Union.

3. If at any time the Steering Committee deems that a full time Chairman (Arbitrator) is no longer required, a per diem rate will be determined by an annual budget and approved by the Parties on 1 January of each year. Where the Parties cannot agree upon the per diem rate, such matter shall be referred to arbitration under Article 3.03(e) of the Collective Agreement. Such per diem rate will be shared equally by the Parties.

(b) JEMAC Members

The salaries of the J.E.M.A.C. members appointed by the OTEU shall be paid by B.C. Hydro. Expenses of these members shall be the responsibility of the OTEU.

(c) OTEU Job Evaluation Officer(s)

On implementation of the new plan, the Union may appoint one (1) or more Job Evaluation Officer(s), whose duties shall be as described in the JEMAC Manual. All costs related to the Job Evaluation Officer(s) will be borne by the B.C. Hydro/OTEU members.

2.08 AGREEMENT AMENDMENTS

The Parties agree that, by mutual agreement, they may modify any term of the Collective Agreement which they deem appropriate in regard to implementing the Job Evaluation Plan and its administration, so as not to be in conflict with the Plan.

2.09 JOB EVALUATION EXCLUSIONS

(a) If either of the Parties is of the opinion that the circumstances of a job are such that its value cannot be determined solely by application of the Job Evaluation Plan, the job shall be discussed by the Job Evaluation Supervisor and Union Job Evaluation Officer (or delegates) to resolve the question. If they agree, they will document the reason(s) for the Job Evaluation Exclusion.

(b) If they cannot agree on the exclusion, or an agreement has not been reached within five (5) days, the question shall be referred to the JEMAC Chairman who will act as a single arbitrator in determining the applicability of the Plan to the job in question. The JEMAC Chairman (arbitrator) will provide a ruling final and binding on both Parties, except as provided for in 2.09-(d), within five (5) days of receiving the question and will provide the Parties with documented reason(s) for the ruling.

(c) In the event that the Parties are unable to agree on an appropriate salary for a Job Evaluation Exclusion within ten (10) days of a decision under (a) or (b) above, Hydro shall implement the salary they proposed for the job, subject to the Union's right to refer the matter to Stage IV of the grievance procedure.

(d) Excluded jobs will be reviewed bi-annually by the Job Evaluation Supervisor and Union Job Evaluation Officer (or delegates) to determine whether or not the reasons for exclusion still exist and whether or not Job Evaluation Exclusion status should continue to apply. If they cannot agree, then (b) above shall apply.

(e) Once a question of exclusion has been resolved under the provisions of (a), (b) and/or (d) above, the question may not again be raised for the same job(s) within the term of the Collective Agreement.

(f) Salary treatment resulting from the application of the provisions of Article 2.09 shall be as per Article 2.04(a).

2.10 Until the Plan is implemented, the Stevenson and Kellogg Job Evaluation Plan shall remain in effect. In the event that the conditions of Article 2.02(a) have not been met by 1 January 1982, the foregoing provisions of Article 2 shall lapse, be replaced by the provisions of Article 2 as they existed at 31 March 1981, and job evaluation will be conducted according to a revised version of the Stevenson and Kellogg Job Evaluation Plan.

ARTICLE 3
GRIEVANCE PROCEDURE

3.01 "Grievance" means any difference between the persons bound by this Agreement concerning its interpretation, application, operation, or any alleged violation thereof, or any
<table>
<thead>
<tr>
<th>Level Definition:</th>
<th>This level covers positions which involve routine clerical work consisting of varied repetitive tasks of limited complexity. Work is performed according to established practices and procedures.</th>
</tr>
</thead>
</table>
| Typical Duties:  | - Performs routine tabulations of data and posts in various types of record books.  
- Performs telephone and/or reception duties; receives and directs visitors and telephone calls; provides routine information.  
- Verifies calculations on vouchers, invoices and other business forms.  
- Types a variety of forms, selecting information to be typed from other prepared documents.  
- Copytypes non-complex statements and correspondence.  
- Maintains simple office record systems, such as, mailing lists, filecards, inventories.  
- Sorts, assembles and files materials in accordance with established systems.  
- Opens, sorts, date-stamps and routes mail; collects and processes out-going mail; may provide messenger service.  
- Duplicates materials as requested.  
- Performs other duties related to the qualifications and requirements of the job. |
| Decision Making: | The nature of the work is routine and clearly defined. All problems are referred to supervisor. |
| Supervision Received: | Employees are given detailed oral or written instructions and work under supervision. Routine duties are carried out without ongoing instruction. |
| Supervision Exercised: | Employees in this class do not supervise, but may explain work sequences to others. |
| Minimum Qualifications |  |
| Education: | High school graduation with training in typing and basic office procedures and practices. |
| Experience: | On-the-job training is provided. |

2...
skills

Ability to type at 40 w.p.m. and to operate the normal range of office equipment which may be required in performance of duties, such as, calculators, copying machines; data entry systems; ability to follow and to carry out instructions; good verbal communication skills required for public service areas.
Types on a manual or electric typewriter or varitypewriter from longhand, rough draft, typed copy, or printed matter, correspondence, memoranda and other narratives, fill-in forms, drawings, lists and statements, and other office records, etc. which may include technical terminology and unusual terms and vocabulary.

Plans typing-layouts and arrangements. Checks and proofreads work detail singly or with others for typing accuracy.

In conjunction with the above and usually incidental thereto, performs a composite of varied clerical duties of an elementary and routine nature:

- prepares, completes, matches and/or processes routine forms, reports, etc.
- transfers information from printouts and other source data to office records
- opens, sorts, dispatches, delivers, etc. incoming and outgoing mail
- performs arithmetic computations
- maintains stationery supplies
- maintains records and files
- takes and relays telephone and other messages
- performs other clerical duties of a similar order

Operates office equipment such as typewriter, varitypewriter, calculator, etc.

Performs related duties as assigned of a minor nature which do not affect the value of the job.
APPLICATIONS ARE INVITED FOR FOLLOWING VACANCY

JOB          Clerk-Typist (General)  WAGE GROUP       2

DIVISION OR DEPT.          DISTRICT OR SECTION           LOCATION

HIRING SUPERVISOR

IMMEDIATE SUPERVISOR (WHERE POSSIBLE)

FORWARD APPLICATIONS TO HIRING SUPERVISOR:

NAME

CITY AND ADDRESS

TEL. NO.

PREREQUISITES

EDUCATION:          Grade XII or equivalent.

SKILLS, EXPERIENCE, APTITUDES (ETC.):

Typing

OUTLINE OF DUTIES

Type correspondence, etc. Maintain records and files, prepare routine reports, etc. Perform related duties as assigned of a minor nature which do not affect the value of the job.
## APPENDIX H
### SUBSTANTIATING DATA SHEET
#### (SUBSTANTIATION OF FACTOR RATINGS)

<table>
<thead>
<tr>
<th>FACTOR</th>
<th>EVALUATION PTS.</th>
<th>DGR.</th>
<th>JOB</th>
</tr>
</thead>
<tbody>
<tr>
<td>M.D.</td>
<td>30</td>
<td>C</td>
<td>Clerk-Typist (General)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Skilled operation of manual or electric typewriter (Company standard = min. 50 w.p.m.) Planning of typing-layouts and arrangements.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Knowledge of pertinent office routines and of various types of routine forms, reports, etc.</td>
</tr>
<tr>
<td>J.K.</td>
<td>60</td>
<td>D</td>
<td>Typing.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>(2 + 2.5 = 4.5) months</td>
</tr>
<tr>
<td>A.J.</td>
<td>10</td>
<td>B</td>
<td>Simple analysis in preparing, completing, matching and/or processing routine forms, reports, etc. requiring little or no choice of procedure in course of action to be followed.</td>
</tr>
<tr>
<td>P.E.</td>
<td>10</td>
<td>C</td>
<td>Physical effort for over 40% but less than 80% of the time, primarily typing.</td>
</tr>
<tr>
<td>M.A.</td>
<td>10</td>
<td>C</td>
<td>Average demand as found in most office jobs.</td>
</tr>
<tr>
<td>ACC.</td>
<td>10</td>
<td>B</td>
<td>Errors could have a moderate effect resulting in irritation or annoyance within the Company. (Generous)</td>
</tr>
<tr>
<td>B.R.</td>
<td>0</td>
<td>A(1)</td>
<td>Contacts within the Company would generally be restricted to exchange of routine information without necessity for interpretation. Could apply to some jobs occasionally.</td>
</tr>
<tr>
<td></td>
<td>10</td>
<td>B(1)</td>
<td></td>
</tr>
<tr>
<td>CON.</td>
<td>0</td>
<td>F</td>
<td>Required to work with information containing little of a confidential nature.</td>
</tr>
<tr>
<td>DIR.</td>
<td>0</td>
<td>F</td>
<td>N/A</td>
</tr>
<tr>
<td>J.C.</td>
<td>0</td>
<td>F</td>
<td>No unusually undesirable working conditions.</td>
</tr>
</tbody>
</table>
OTEU JOB DESCRIPTION

<table>
<thead>
<tr>
<th>JOB TITLE</th>
<th>DATE PUBLISHED</th>
<th>JOB CODE</th>
<th>GROUP DATED</th>
<th>PAY DEPARTMENT NO.</th>
<th>REPORTS TO</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLERK-TYPIST</td>
<td>January 1989</td>
<td>HCAIAE</td>
<td>OPERATIONS ADMINISTRATION</td>
<td>1941</td>
<td>CDH20C</td>
</tr>
</tbody>
</table>

Section 1: Duties and Responsibilities

Performs a variety of typing and clerical duties including laying out and typing from rough drafts, correspondence, memoranda, forms and reports; maintaining departmental stationery supplies; distributing and routing incoming and outgoing mail. Acts as departmental receptionist. Operates a secretarial answering unit.

1. Performs a variety of typing and clerical duties including:
   
   (a) laying out and typing from rough drafts material containing technical terminology including reports, correspondence, memoranda and forms;
   
   (b) opening, sorting, stamping, recording and distributing incoming mail and routing outgoing mail;
   
   (c) maintaining departmental filing and record keeping systems;
   
   (d) updating catalogue file;
   
   (e) ordering and maintaining stationery and drafting supplies;
   
   (f) operating a photocopy machine;
   
   (g) preparing typing and routing such forms as purchase requisitions and general work orders.

2. Acts as receptionist by directing visitors to appropriate personnel, answering routine enquiries and taking messages.

3. Answers telephones; operates a secretarial answering unit; takes and relays messages.

4. Occasionally may be required to arrange for printing or copying of drawings and distribute drawings as requested.

5. Performs duties of a minor nature related to the above duties which do not affect the rating of the job.
OTEU JOB DESCRIPTION

Section 2: Work Circumstances

FORMAL EDUCATION

Knowledge Required:

1. How to type. (Duty 1(a))
2. How to maintain a general filing system. (Duty 1(c))
3. How to operate a duplicating machine and a telephone switchboard. (Duties 1(f), 3)
4. How to communicate orally. (Duties 2, 3)

Highest Courses or Programs Required:

- Office Practice 12.

EXPERIENCE

A. PREVIOUS PRACTICAL EXPERIENCE

Knowledge Required:

- No knowledge or skills learned on other jobs is required.

B. KNOWLEDGE ACQUIRED ON THE JOB

Knowledge Required:

1. How to distribute incoming mail and route outgoing mail. (Duty 1(b))
2. How to maintain stationery supplies. (Duty 1(e))
3. How to update records of general work orders. (Duty 1(g))
4. How to lay out typing assignments to Hydro's format. (Duty 1(a))
5. How to update departmental catalogues. (Duty 1(d))
6. How to prepare and route forms such as purchase requisitions and general work orders. (Duty 1(g))
7. How to arrange for printing of drawings. (Duty 4)
8. How to distribute drawings. (Duty 4)
9. How to setup format for typing of technical reports. (Duty 1(a))
10. Knowledge of policies and procedures governing work in section. (Duties 1 to 4)
11. Knowledge of key personnel, their basic responsibilities and functions. (Duties 1 to 4)

Approximate Learning Time: 1 month, 2 weeks.

Approximate Elapsed Time: 3 months.