Introduction

The City of Hamilton’s Total Compensation Policy contributes to the City’s goal to become a City of choice for high performing public servants in attracting, retaining, motivating and rewarding employees. This total compensation links to the mission, vision and values of the City and is the sum of salaries, benefits and perquisites.

Total compensation recognizes and rewards factors such as employee contributions to the mission, vision and values of the City and employee behaviours that reflect the corporate values.
The City of Hamilton seeks to ensure external competitiveness in the employment market through compensation practices that are fair, equitable, consistent, aligned, competitive, affordable and in accordance with the legal requirements of the Pay Equity Act and The Employment Standards Act.

**Purpose**

The purpose of this Manual is to:

- describe the City's 1041 Job Evaluation Plan which is the tool used to evaluate jobs;
- establish the method for documenting and rating jobs through the application of the Job Evaluation Plan;
- define the terms used in job evaluation related processes; and
- maintain a gender-bias free and equitable salary structure.

**C.U.P.E. 1041 Job Evaluation Plan**

Job evaluation is a way of measuring jobs to determine the relative value of the job. It measures the skill, effort, responsibility and working conditions of jobs so that jobs can be compared one to the other to ensure internal equity. Job evaluation assesses the value of the work not the person.

The City of Hamilton’s C.U.P.E. 1041 Job Evaluation Plan was designed specifically to measure C.U.P.E. 1041 jobs in the City. It is the measurement tool applied to all C.U.P.E. 1041 jobs to assess a job’s value.

The Plan uses 14 factors to measure jobs. Each factor has several levels to reflect the diversity of the City’s C.U.P.E. 1041 jobs. In addition, some factors have two dimensions (breadth and depth) so that in total, the plan measures 22 different aspects of each job. Applying the factors to a job results in a rating which is the evaluation of the job's worth or value. Jobs of similar worth or value are grouped together into salary levels so that similar jobs are paid similarly.

Once all jobs have been evaluated or rated, a foundation exists from which to measure changes in job content.

The following principles apply to job evaluation:

- It is the content of the job that is analyzed, not the person doing the job;
- Jobs are evaluated without regard to existing job rates;
- Jobs are evaluated on each factor by considering the specific requirements of the job; and
- Workload is not a consideration in evaluating a job.

Details of the C.U.P.E. 1041 Job Evaluation Plan, including a description of the factors, are available [here](#).
Documenting and Evaluating Jobs

Jobs are evaluated based on information that is gathered and documented in various types of job documents. Job documents contain the information used to rate a job and to compare and assess changes in a job so that it can be assigned to the proper level in the salary schedule. Job documents must provide complete details about the job so that it can be evaluated and assigned a fair and equitable salary given its skill, effort, responsibility and working conditions.

One of the primary sources of information about a job is the job description. Management and Human Resources are jointly responsible for ensuring that job descriptions are accurate and up-to-date. This will ensure that jobs are appropriately evaluated and appropriately paid.

In addition to job descriptions, job documents also include Job Analysis Questionnaires, job site reviews, and interviews.

Creating a New Job

1. Obtain Authority to Create the New Job
   
   New jobs are approved in accordance with the following authorities:

<table>
<thead>
<tr>
<th>APPROVAL TO ESTABLISH POSITIONS WITHIN APPROVED DEPARTMENT BUDGET</th>
<th>APPROVAL TO ESTABLISH POSITIONS WITHIN APPROVED CORPORATE BUDGET</th>
<th>APPROVAL TO ESTABLISH POSITIONS OUTSIDE APPROVED CORPORATE BUDGET</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Manager</td>
<td>City Manager (on recommendation of Corporate Management Team)</td>
<td>City Council (on recommendation of City Manager)</td>
</tr>
</tbody>
</table>

2. Document the New Job
   
   The Manager or Supervisor, to whom the new job will report, completes a C.U.P.E. 1041 Job Information Synopsis Form (JIS) to document the primary function of the job and its duties and responsibilities. Click here for a JIS.

   The JIS must be signed off by the appropriate organizational levels as described in the JIS document.

   The Manager or Supervisor will select a job title in accordance with the Job Titling Guidelines attached as Appendix "A". Click here for Job Titling Guidelines.
3. Submit Job Information to Human Resources

The Manager or Supervisor submits the completed and signed off C.U.P.E. 1041 Job Information Synopsis form along with a job description to the Compensation Specialist responsible for the department. Compensation Specialists are available to assist in the preparation of job descriptions. Job descriptions are retained on job files held in Human Resources. A list of Compensation Specialists and their departmental portfolios is available here.

4. Assign a Preliminary Evaluation to the Job

The Compensation Specialist will evaluate or rate the job by applying the C.U.P.E. 1041 Job Evaluation Plan to the job based on the information contained in the JAQ. Each factor in the Job Evaluation Plan is assessed and a preliminary evaluation of the job is established to determine the salary level.

At this stage, the Compensation Specialists may request that job documents such as JAQs or job descriptions be completed for other related positions in the work unit or elsewhere in the organization to ensure consistency in the application of the job evaluation plan.

The Compensation Specialist will inform the Union and the Manager or Supervisor who submitted the job for evaluation of the results of the evaluation, i.e. the salary level to be applied to the job.

The evaluation of the job is subject to the reconsideration process provided for in these procedures. Click here for the reconsideration process. If no request is made for reconsideration within thirty (30) calendar days, the evaluation of the job becomes final and binding.
Evaluating Changes in an Existing Job

Changes in job content can affect the skill, effort, responsibility and/or working conditions of a job, and thus its value and the level at which it is paid. Changes to job content can occur as a result of departmental restructuring, introduction of a new program or creation or deletion of services by another authority or jurisdiction.

Managers and Supervisors who have jobs reporting to them that have changed must initiate the process for reviewing the job to ensure that it is paid fairly. This is done by having the incumbent complete a Request to Evaluate Changes in an Existing Job form attached as Appendix “A” and a Job Analysis Questionnaire click here for a JAQ. Changes in jobs must be reported as soon as possible to avoid creating and perpetuating pay inequities.

The process for evaluating a job that has changed is as follows:

1. Document the Changes in the Job
   The incumbent(s) or Manager/Supervisor can initiate a review of the position. The incumbent(s) complete(s):
   - a Request to Evaluate Changes in an Existing Job Form (click here to access the form) outlining what has changed in the job and what factors should be reviewed; and
   - those portions of the Job Analysis Questionnaire that address the changes in the job’s skill, effort, responsibilities and working conditions.

2. Submit Job Information to Human Resources
   The incumbent submits a completed Request to Evaluate Changes in an Existing Job (click here to access the form), a completed JAQ (click here to access the form) and a revised job description. It is important to submit a revised job description so that it is accurate and up-to-date. The Supervisor or Manager submits the forms to the Director for sign off. Signing the Request to Evaluate Changes in an Existing Job and the JAQ indicates full agreement with the information contained in these documents.

   Once all documents have been signed off, the Director submits them to the appropriate Compensation Specialist. Click here for a list of Compensation Specialists by department.

3. Assign an Evaluation to the Job
   The Compensation Specialist reviews the Request to Evaluate Changes in an Existing Job Form, job description, Job Analysis Questionnaire and other job documents provided. Using those documents, the Compensation Specialist conducts an assessment of the changes in the job and the impact those changes have on the evaluation and classification of the job.

   The Compensation Specialist may also request a site inspection or interviews with incumbents, Supervisors or Managers.

   At this stage, the Compensation Specialist may request that job documents such as JAQs or job descriptions be completed for other related positions in the work unit or elsewhere in the organization to ensure consistency in the application of the job evaluation plan.
The Compensation Specialist will inform the Union, the incumbent(s), the immediate Supervisor or Manager and the Director, in writing, of the results of the evaluation, ie the salary level to be applied to the job. Rating information will be released only to the Union Office, the incumbent(s) of the job or to the immediate Supervisor, Manager, Director and General Manager or Executive Director.

The evaluation of the job is subject to the reconsideration process provided for in these procedures. Click here for the reconsideration process. If no request is made for reconsideration within thirty (30) calendar days, the evaluation of the job becomes final and binding.

Requesting Reconsideration

The rating of a C.U.P.E. 1041 job is subject to review or reconsideration by the C.U.P.E. 1041 Reconsideration Committee created for this specific purpose. The procedure for reconsideration is as follows.

1. The incumbent(s) or Managers/Supervisors who disagrees with the rating for the job can submit a completed Request for Reconsideration form within thirty (30) calendar days of receipt of the rating.

2. The Request for Reconsideration will be reviewed and signed off by the immediate supervisor, Director and General Manager indicating full agreement with the contents of the documentation.

3. The completed form is submitted to the appropriate Compensation Specialist who is responsible for the department.

4. The C.U.P.E. 1041 Reconsideration Committee consists of two management and two union representatives.

A pool of management and union representatives will be established and trained in job evaluation to exercise a quality assurance role. In this capacity, Committee members will become familiar with the City's C.U.P.E. 1041 Job Evaluation Plan and will apply the Plan by:

- assessing how consistently and equitably the principles of job evaluation in general and the City’s job evaluation plan in particular, were applied;
- reviewing benchmark jobs for rating consistency and to ensure the maintenance of relativities; and
- reviewing documentation (Job Analysis Questionnaires, organization charts, etc.) relevant to the evaluation of evaluated positions.

Members of the C.U.P.E. 1041 Reconsideration Committee will participate on a four member panel to hear Requests for Reconsideration.

Committee members will not be called to sit on a panel to review any position where they may be seen to benefit personally or operationally from the result of the evaluation submitted for review. In such a case, the C.U.P.E. 1041 Review member will not
participate in the decision and another member of the C.U.P.E. 1041 Reconsideration Committee will participate in the panel.

5. Members of the Committee will meet as required and will be granted time off with pay for Committee activities.

6. The C.U.P.E. 1041 Reconsideration Committee will meet to review and consider the Request for Reconsideration. The Committee may ask the incumbent, the incumbent(s)' Manager(s)/Supervisor(s) and/or the relevant Compensation Specialist to attend at the meeting to provide further information. The Compensation Specialist will not participate in the Committee’s decision.

7. The Compensation Specialist will communicate the Committee's decisions in writing to the Union, the incumbent(s), the incumbent's Supervisor, Director and General Manager.

8. Decisions of the C.U.P.E. 1041 Reconsideration Committee are final and binding.

9. In the event the C.U.P.E. 1041 Reconsideration Committee is unable to arrive at a decision on the appeal, the following procedure shall apply:

- The Employer shall install the proposed description and rating for the job and, in accordance with the article titled ‘Evaluating Changes in a Job’, the salary grade to which the job is assigned.

- The Compensation Specialist shall provide the Union with a copy of the installed job description and rating.

- The matter shall be referred to a sole Arbitrator by either party within thirty (30) calendar days.

- All relevant job evaluation documentation shall be available for presentation as evidence at the arbitration hearing.

Salary Administration

Any salary adjustments resulting from job evaluation will be made according to the Reclassification Pay Adjustments Table as follows:

<table>
<thead>
<tr>
<th>Position is</th>
<th>New Salary range is</th>
<th>Employee is</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rated higher</td>
<td>Higher</td>
<td>Placed in the same step in the new salary range that was held in the previous permanent position</td>
</tr>
<tr>
<td>Rated lower</td>
<td>Lower but is within the higher salary range</td>
<td>Placed in the closest higher step of the lower salary range</td>
</tr>
<tr>
<td>Rated lower</td>
<td>Lower and is below the higher salary range</td>
<td>Placed in the salary range according to salary protection formula (three weeks per</td>
</tr>
</tbody>
</table>
Retroactive Payments

If changes in job content result in a higher rating and salary grade for the job, retroactive payments will be paid from the effective date of the changes in the job to a maximum of six months from the date the JAQ was received in Human Resources.

Salary Protection

If changes in the job content result in a lower evaluation and salary grade for a job, the incumbent(s) will be "Salary Protected" at the employee’s current hourly rate. This means that the incumbent(s) will continue to receive the same salary based on three weeks per year of service to a maximum of 18 months, or until such time as the salary protection is no longer necessary. At the conclusion of the salary protection period, the employee(s) will be placed at the highest step in the lower salary range.

Market Rates

In response to market conditions or other factors such as "hot skills", the Employer may establish a job rate that is different from that established through the job evaluation plan. Such rates must be substantiated by difficulty recruiting employees, difficulty retaining staff or a skill shortage of a particular skill set in the local market and/or employment market research. Market rates will be reviewed annually to ensure they continue to be justified.

Pending Retirement

If an employee is within five (5) years of eligibility for an unreduced pension, the employee would be entitled to either the salary protection provisions at their current hourly rate or for such longer period that the employee would need to ensure no negative impact on their best five years of income for pension eligibility. Employees should notify their Compensation Specialist to ensure that the employee meets eligibility for an unreduced pension. These employees may continue to be salary protected to minimize the financial impact on their pension income if within five (5) years of eligibility for an unreduced pension.
### Definitions

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benchmark Jobs</td>
<td>Key jobs that are representative of jobs in the classifications covered by the plan. Benchmark jobs are used as the basis for external comparisons and for maintaining internal equity amongst jobs.</td>
</tr>
<tr>
<td>Collective Agreement</td>
<td>The Collective Agreement currently in effect between the Employer and the Union.</td>
</tr>
<tr>
<td>Compensation Specialist</td>
<td>A position in the Human Resources Department held by individuals trained in job evaluation and compensation administration.</td>
</tr>
<tr>
<td>C.U.P.E. 1041 Reconsideration Committee</td>
<td>Two management and two unionized representative representing the C.U.P.E. 1041 Reconsideration Committee will make final and binding decisions on Requests For Reconsideration</td>
</tr>
<tr>
<td>Factors</td>
<td>The major criteria in the Job Evaluation Plan that are used to measure the value of jobs. The factors measure accountabilities, competencies, physical and environmental demands.</td>
</tr>
<tr>
<td>Incumbent</td>
<td>The person holding a job.</td>
</tr>
<tr>
<td>Job</td>
<td>A group or range of duties or tasks assigned to and performed by the incumbent(s).</td>
</tr>
<tr>
<td>Job Analysis</td>
<td>The process of analyzing a specific job to identify the tasks and duties required to perform the job and the required knowledge, responsibility, effort and working conditions involved in the performance of that job. Job analysis is done by gathering information about the job through questionnaires, job descriptions, observation, and study.</td>
</tr>
<tr>
<td>Compensation Specialist</td>
<td>A position in Human Resources held by individuals trained in job evaluation and compensation administration.</td>
</tr>
<tr>
<td>Job Description</td>
<td>A written statement of the primary function of a job along with its major duties and responsibilities. Job descriptions do not necessarily describe all the work requirements and tasks in a job. Job descriptions may be used for evaluation purposes.</td>
</tr>
<tr>
<td>Job Documents</td>
<td>All documents and documentation relating to a job that are created in the job analysis process, including Job Analysis Questionnaires, Job Information Synopsis forms, job site reviews, job descriptions and interviews.</td>
</tr>
</tbody>
</table>
| Job Evaluation                            | The process of applying the Job Evaluation Plan to a documented job so as to assess the relative worth of the job. Jobs are assessed on eighteen distinct components or factors which consider both accountabilities (outputs) and competencies (inputs). The result of job
evaluation is to assign a salary level to the job by placing it within the City’s 1041 Salary Schedule. Job evaluation focuses on current job content, not employee performance or anticipated changes in job duties. The C.U.P.E. 1041 Salary Schedule is available on the global network as s:/Human Resources/Org/Salary Schedules/1041\(current\ file).

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Evaluation Plan</td>
<td>The Job Evaluation Plan is a measurement tool applied to all 1041 union jobs to assess a job's value.</td>
</tr>
<tr>
<td>Job Rating</td>
<td>The selected degree levels established for each factor in accordance with the Rating Plan which becomes the official rating for the job.</td>
</tr>
<tr>
<td>Reclassification</td>
<td>Where changes in skill, effort, working conditions or responsibility result in a change in rating. The employee in the position is moved to a different salary level with compensation adjusted accordingly.</td>
</tr>
<tr>
<td>Salary Classification</td>
<td>The salary classification as per the 1041 Salary Schedule. s:\Human Resources\Org\Salary Schedules\1041(current file)</td>
</tr>
<tr>
<td>Salary Protection</td>
<td>Maintaining an employee's salary for a period of time when the position the employee holds is rated lower.</td>
</tr>
<tr>
<td>Task</td>
<td>An activity undertaken in order to complete a specific duty, defining how a duty is done.</td>
</tr>
</tbody>
</table>
REQUEST TO EVALUATE CHANGES IN AN EXISTING JOB

<table>
<thead>
<tr>
<th>Name:</th>
<th>Department:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Title:</td>
<td>Date:</td>
</tr>
</tbody>
</table>

This form is to be used to request that an existing job be re-evaluated due to substantive changes in the job’s content. Changes in job content can affect the skill, effort, responsibility and/or working conditions of a job, and thus its value and the level at which it is paid. Changes to job content can occur as a result of departmental restructuring, introduction of a new program or creation or deletion of services by another authority or jurisdiction.

Managers and Supervisors who have jobs reporting to them that have changed must initiate the process for reviewing the job to ensure that it is paid fairly. This is done by having the incumbent complete this Request for Review form and a Job Analysis Questionnaire. These forms along with a revised job description should be forwarded to the Compensation Specialist. Changes in jobs must be reported as soon as possible to avoid creating and perpetuating pay inequities.

Additional or changed duties do not always mean a higher salary. Added duties may result in greater volume of work but not necessarily greater skill, effort, responsibility or working conditions. Additions, deletions or changes to jobs may be neutral, resulting in no change to the salary level of the job.

Please be brief as this summary is intended only as an index of the change(s) detailed in your new questionnaire.

1. Please explain the circumstances that led to changes in your job including how and when the changes occurred.

2. Explain what has been added to your job.

3. Explain what has been removed from your job.
4. The evaluation of a job whose content has changed will take into account changes that have occurred in any of the factors measured by the Job Evaluation Plan. Please indicate which factors, in your opinion, have been affected by the changes in your position and briefly describe the changes. You may wish to refer to the descriptions of the factors in the summary of the Job Evaluation Plan (click here for the summary).

☐ Core Service Delivery & Impact on Safety/Well-being
☐ Fulfilling Regulatory Commitments
☐ Responsibility for Continuous Improvement
☐ Managing People & Scope of Responsibility
☐ Managing Physical & Information Assets
☐ Impact on Financial Effectiveness
☐ Core Knowledge & Nature of Field of Work/Discipline
☐ Depth & Breadth of Supplementary Knowledge
☐ Planning Skills
☐ Communication Skills
☐ Interpersonal Skills
☐ Problem Solving Skills & Challenges
☐ Physical & Sensory Demands
☐ Environmental Demands & Types of Conditions

________________________________________  Date  
Signature of Employee

________________________________________  Date  
Signature of Immediate Supervisor

________________________________________  Date  
Signature of Director
REQUEST FOR RECONSIDERATION
(Following Request to Evaluate Changes in an Existing Job)

Name: [ ]
Department: [ ]
Position Title: [ ]
Date: [ ]

This form is to be used to Request a Reconsideration of your position. A Request For Reconsideration can be initiated if you or your Manager/Supervisor disagree(s) with the rating received following the Request to Evaluate Changes in an Existing Job. In the sections below, indicate the areas of disagreement by providing additional examples to support your position. Examples should include what would normally be expected of any employee who is fully experienced in all aspects of the work. Examples should not describe isolated incidents. Briefly describe what elements of the job you feel have not been evaluated appropriately on a factor by factor basis. Attach additional pages as required.

Requests for Reconsideration are decided by the CUPE 1041 Joint Reconsideration Committee consisting of two management and two union representatives. Decisions of the Joint Reconsideration Committee are final and binding. Please refer to the CUPE 1041 Job Evaluation Manual of Procedures for more information about the reconsideration process.

Please submit the completed form to your assigned Compensation Specialist.

☐ Core Service Delivery & Impact On Safety/Well-being

☐ Fulfilling Regulatory Commitments
<table>
<thead>
<tr>
<th>Section</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility for Continuous Improvement</td>
<td></td>
</tr>
<tr>
<td>Managing People &amp; Scope of Responsibility</td>
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<td></td>
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<tr>
<td>Impact on Financial Effectiveness</td>
<td></td>
</tr>
<tr>
<td>Core Knowledge &amp; Nature of Field of Work/Discipline</td>
<td></td>
</tr>
</tbody>
</table>
## Depth & Breadth of Supplementary Knowledge

- 
- 
- 

## Planning Skills

- 
- 
- 

## Communication Skills

- 
- 
- 

## Interpersonal Skills

- 
- 
- 

## Problem Solving Skills & Challenges

- 
- 
- 

Physical & Sensory Demands

[] Environmental Demands & Types of Conditions

Signature of Employee Date

Management Signatures:

Immediate Supervisor – I agree that the information provided in this appeal form about the position’s job duties is accurate and complete.

<table>
<thead>
<tr>
<th>Name (please print)</th>
<th>Signature</th>
<th>Date</th>
</tr>
</thead>
</table>

Director – I agree that the information provided in this appeal form about the position’s job duties is accurate and complete.

<table>
<thead>
<tr>
<th>Name (please print)</th>
<th>Signature</th>
<th>Date</th>
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</table>