# DALHOUSIE UNIVERSITY JOB EVALUATION MANUAL GROUP A- CLERICAL

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# **FACTOR 1 – MENTAL DEVELOPMENT**

This factor measures the requirements of a job with respect to the degree of mental development needed to think in terms of and understand the work being performed. Ratings in this factor are based on the highest significant characteristics or requirements of a job. Mental development may be obtained either through formal schooling or actual experience. Personal characteristics (e.g., tact, maturity, etc.) where required, should be considered under this factor.

DEGR		POINTS
Α	Ability to understand and apply simple oral instructions under direct supervision.	0
В	Ability to understand and apply simple oral and written instructions for single procedure jobs under direct supervision.  May Include:  Pickup and delivery of mail/printing jobs to or from various departments on campus	15
c	Ability to understand and apply simple oral or written instructions for jobs with some variety of work operations with general supervision readily available.  May Include:  Operation of office equipment such as a keyboard  Collection of library material and distribution to Circulation Department or stacks as directed  Processing of incoming or outgoing mail  Processing of purchase order invoices for payment upon receipt of goods  Maintenance of numeric system of student files	30
D	Ability to understand and apply oral or written instructions which are at times general in nature for jobs with a variety of work operations under general supervision.  May Include:  Performance of general clerical/secretarial/receptionist duties Performance of record keeping, bookkeeping and filing duties Processing receipt of incoming book orders and participating in book returns Supervision of purchasing and invoicing procedures and solving related problems Coding documents; processing forms for daily computer input	45
E	Ability to exercise initiative; to understand and apply instructions of a more general nature and the governing principles of a diverse field of work with a minimum of supervision.  May Include:  • Ensuring effective daily functioning of a given area – act as office manager  • Providing broad range of receptionist and information services. Perform public relations function  • Responsibility for buying text books, order and stock control processes  • Performing bibliographic functions in library, cataloguing, classifying, searching	60
F	Ability to exercise initiative; to understand and apply the governing principles of a highly diverse and/or specialized field of work in a non-professional capacity.  May Include:  Planning and executing public relations/information programs  Maintaining liaison among faculty, staff, other faculties and University offices  Responsibility for coordinating production and sales of publications	75

### **FACTOR 2 – JOB KNOWLEDGE**

This factor measures the number and complexity of skills and items of knowledge that must be learned through education, training and/or experience in order to do a job satisfactorily. This is done by estimating the minimum length of learning time required by the average selected employee who has the required mental development but no previous experience, assuming that such learning is under an organized procedure.

Learning time includes the time required to obtain the necessary factual knowledge, skill in the application of that knowledge, skill in the use of the media associated with the work, and skill in the operation of equipment. This involves the best possible combination and sequence of training courses, on-the-job instruction and actual job experience on every operation necessary to successful job performance. This may involve only training on the job being evaluated, or it may combine such training with experience on other jobs or formal education which is directly applicable to the new assignment. Learning time previously spent on obtaining knowledge or skill which is not required by the current job is excluded.

Learning time includes the time taken to obtain any required specialized skills and any time spent in actual productive work when such work is needed to obtain a satisfactory performance level in the skill.

There are two basic elements in the acquiring of job knowledge:

- 1. Acquisition of required skills
- 2. Training time

### 1. SKILLS ACQUISITION

This is the amount of time to be included in the total "months of learning time" in recognition of the time spent to acquire readily identifiable skills required for the job under consideration. These times are as follows:

1	KEYBOARDING	Use of a keyboard at good speed with few errors; understanding of its basic features; ability to undertake simple maintenance tasks.	2.5 mos.
2	LIMITED KEYBOARDING	Ability to use a keyboard at less than proficient speed <u>or</u> required less than 10% of the time worked.	1.0 mos.
3	DICTAPHONE	Use of transcribing equipment.	1.0 mos.
4	STENOGRAPHY	Ability to take a recognized form of shorthand at good speed.	3.0 mos.
5	LIMITED STENOGRAPHY	Ability to take a recognized form of shorthand at less than proficient speed or required less than 10% of the time worked.	1.0 mos.
6	CALCULATOR/ ADDING MACHINE	Basic – Use of all functions for simple calculations less than 10% of the time worked.  Limited – Use of calculator 10% of the time worked or more for relatively complex calculations, e.g., grade point averages.	0.0 mos. 1.0 mos.
		Math Program – Regular use of software math program.	1.0 mos.
		Full – Regular use for all functions, e.g., payroll/accounting clerks.	2.0 mos.
7	TAPE RECORDER		0.0 mos.

8	PERSONAL/DESKTOP COMPUTER	Full speed and skill in operation of a personal/desktop computer. Includes use of multiple software programs.  NOTE: 6.0 mos. = 2.5 mos. Keyboarding and 3.5 mos. Computer Skill	6.0 mos.
9	INTERMEDIATE COMPUTER	Moderate capability (e.g., full use of one program) and/or comprises 15-75% of job content.  NOTE: 4.5 mos. = 2.5 mos. Keyboarding 2.0 mos. Computer Skill	4.5 mos.
10	LIMITED COMPUTER	Ability to use computer at less than proficient speed <u>or</u> required less than 10% of the time worked.  NOTE: 3.0 mos. = 2.5 mos. Keyboarding  0.5 mos. Computer Skill	3.0 mos.
11	TELEPHONE	Use of a standard multi-line desk telephone.	0.0 mos.
12	CASH REGISTER		1.0 mos.
13	MAILING MACHINE		0.0 mos.
14	FAX MACHINE		0.0 mos.
15	CREDIT CARD MACHINE		0.0 mos.
16	PHOTOCOPIER	In normal office setting (key operator).  Specified maintenance operator.	0.0 mos. 1.5 mos.
17	SPECIALIZED TERMINOLOGY	Occasional use or use limited to a very specific area.  Regular exposure and use, e.g., clinical and/or scientific/research terminology.  Extensive use and complex subject matter, e.g., clinical and scientific/research terminology, several foreign languages, mathematical signs and symbols.	1.0 mos. 2.0 mos. 3.0 mos.
18	OTHER LANGUAGES	Fully bilingual, required to read, write and speak at the level of a first language.  Ability to read and speak and be understood.  Ability to read with assistance.	12.0 mos. 6.0 mos. 3.0 mos.
19	LIBRARY SUBJECT SPECIALIST		6.0 mos.
20	SPECIALIZED SKILLS	Awarded as appropriate.	

# 2. TRAINING TIME

Training time is the time required beyond the level of secondary education required by the position and beyond skill acquisition that is necessary to become proficient in performing the tasks required of the job under consideration.

The number of months required is then halved to recognize that proficiency is acquired on a cumulative basis and, therefore, a portion of the work performed by the incumbent is already at the proficient level at any particular time. Care should be taken to avoid the inclusion of more production time than is necessary to reach satisfactory proficiency.

# **APPLICATION**

DEGREE OF JOB KNOWLEDGE	POINTS	JOB KNOWLEDGE
Α	0	Less than 1 month
В	15	1 but less than 2
С	35	2 but less than 4
D	55	4 but less than 7
E	70	7 but less than 10
F	85	10 but less than 14
G	95	14 but less than 19
н	105	19 but less than 24
I	110	24 but less than 30
J	115	30 but less than 36
К	120	36 and over

### **FACTOR 3 – ANALYSIS & JUDGMENT**

This skill factor measures the difficulty of jobs in terms of analytical ability required and judgment exercised. Analysis is defined as the identification of relevant information or conditions; judgment is the application of this information to determine the course of action to be followed. [It is understood that an incumbent exercising any degree of analysis and judgment possesses the required degree of Mental Development (Factor 1) and Job Knowledge (Factor 2).]

Levels of job difficulty are established by assessing the variety and/or complexity of work operations, the subject matter involved, and the extent to which detailed instructions or supervision is available. When decisions are made without supervisory assistance, the incumbent is normally guided by established policies.

Although the degree award (i.e., the level of job difficulty/complexity) under this factor is directly related to responsibility for taking independent action, within the limits of delegated authority, the result of taking the action specified is not a consideration in the rating, since this aspect of the job is recognized under the responsibility factors (Accuracy, Business Relations, Confidential Information, Direction of Others).

DEGRE	E	POINTS
Α	Work items require little or no analysis and course of action is specified.  • Identification of names and/or chart numbers for sorting and filing	0
В	Analysis of readily identifiable information or conditions with minimal scope for independent action.  Work operations are well defined. Recognize when to refer to supervisor.  Receive and direct incoming calls and/or mail Assist in maintenance of files Handle routine inquiries and problems (telephone and in person) Perform basic receptionist duties Perform basic clerical/secretarial duties: e.g., determine format of materials to be typed Issue keys Receive and check off-campus borrowers' applications Perform simple bibliographic searching tasks Assist in instructing basic mechanisms of simple tasks to temporary staff, e.g., shelving process	10
C	Analysis of readily identifiable information or conditions with decisions as to course of action as required for the employee to organize own priorities to deal with routine tasks. However, day-to-day supervision is exercised over the incumbent's work.  • Perform duties of clinic receptionist • Schedule patient appointments, laboratory tests • Schedule meetings/appointments for academic or administrative staff and assure knowledge of daily commitments • Record meeting minutes • Use library facilities to retrieve material and check and obtain references, review data for reasonableness and completeness • Correlate invoice data; handle delinquent phone bills; issue departmental invoices; deal with receipt of damaged goods • Use original composition on routine matters • Make travel arrangements • Search for missing books in libraries (continued)	20

	<ul> <li>Responsible for compilation of student work schedules</li> <li>Deal directly with vendors</li> <li>Clerically in charge of overdue book system</li> </ul>	
D	Analysis of a variety of information or conditions necessary to make judgments pertaining to: clerical coordination of a unit; participate in recommendation for hire/dismissal of support staff; provide advice on a limited number of departmental/divisional matters and act as liaison person in these matters. Duties are performed with a minimum of supervision.  Set work priorities for self and/or others In accordance with established guidelines, answer inquiries, solve problems and apply accounting principles in balancing ledgers or reconciling controlling records from a variety of sources Hold signing authority for routine matters Screen appointments and schedule meetings for a number of persons having complex work priorities and schedules Collect, organize and compile data for surveys, reports, etc. Compile bibliographies Exercise subject specialist responsibilities (libraries)	30
E	Analysis of a variety of complex information or conditions necessary to make highly independent judgments regarding the application of general principles of a specialized field of work and to make decisions as to a course of action on complex or non-recurring problems. Duties are performed on a consultative basis.  Initial screening of applicants by university staffing officers Continuous adjustment of work priorities for self and/or others Act in liaison capacity with a high degree of frequency and have contacts at a variety of levels of responsibility within and/or outside the University Prepare art exhibitions, personally selecting pieces Regularly use original composition e.g., highly specialized correspondence, newspaper stories, reports, surveys, etc. Provide a wide range and/or depth of information, e.g., student affairs	40

# **FACTOR 4 – PHYSICAL EFFORT**

This factor measures the demand for physical effort. Physical effort is operation of office machines involving manipulative effort or other physical activities.

DEGRE	E	POINTS
А	Work requires physical effort such as is present in the usual desk job. This effort is required less than 30% of the time.	5
В	Work requires physical effort for 30% but less than 70% of the time.	10
С	Work requires physical effort 70% of the time or more. Work requires physical effort 30% but less than 70% of the time outdoors.	15
D	Work requires physical effort 70% of the time or more outdoors. Work regularly requires heavy physical effort, e.g., lifting and handling heavy objects.	20

# **EXAMPLES**

Office machines may include:

- Typewriter/keyboard
- Calculator
- Photocopier
- Telephone
- Cash register
- Binding and cutting machinery

Physical activities may include:

- Standing
- Walking
- Lifting
- Carrying
- Filing
- Shelving
- Packing and unpacking
- Mail
- Physical inventory
- Collating
- Keyboarding

# **FACTOR 5 – MENTAL ATTENTION**

This factor measures the overall demand for intensity of mental application, as indicated by the degree of concentration, or close attention required for satisfactory performance of the work or by the frequency with which time limits or peak loads must be met.

The award has no connection with the difficulty or complexity of the assignment or the physical effort required since these requirements are measured under other factors.

DEGRE	E E	POINTS
Α	Demand is low, intermittent or not usually sustained as required in the performance of simple messenger duties.	0
	Represents the normal demand for mental application as found in an overwhelming majority of the office jobs in this University.	
В	May include:	10
	<ul> <li>Normal variety of work operations with periodic time limits</li> </ul>	
	Repetitious operations without time limits	
	Applicable only to jobs in which there is an abnormal demand on a regular basis.	
	May include:	
	<ul> <li>High volume of keyboarding assignments generated on a continuous basis with time limits in force constantly</li> </ul>	
С	<ul> <li>Continuous attention to precise detail, with time limits constantly in force or notable sustained peak periods evident</li> </ul>	20
	<ul> <li>Continuously dealing with volume of varied material with time limits in force (e.g., library shelvers)</li> </ul>	
	<ul> <li>Sustained application of concentration required to deal with constant influx of in-person and telephone queries</li> </ul>	

### **FACTOR 6 – ACCURACY**

This factor measures the requirements of the job in terms of the effect that errors will/could have on University or Departmental efficiency, service or reputation. Such a perceived effect must be one or more which results from the employee's failure to exercise sufficient care in performing his or her duties.

When the duties concerned (in measuring the accuracy factor) are checked and verified, countersigned or subsequently authorized as a specialized operation or as part of a subsequent operation, the credit for the need for accuracy is given to the job which carries the assigned supervisory responsibility.

Ratings are normally to be based on the effect of the most serious potential single error in the job and not on cumulative effect of a series of single errors.

However, in jobs where an initial error in judgment could cause recurring errors in subsequent work, the potential cumulative effect should be considered.

Errors causing delay or inconvenience only to the employee making the error, or errors which are possible but highly unlikely are not recognized in the assignment of points under this factor.

GRI	=E	POINT
4	Errors having little or no effect such as those causing minor delay, insignificant confusion or minimal material waste and which can be corrected by the incumbent.	0
	Errors having a moderate effect such as those which could result in the University, its employees or others being irritated and/or inconvenienced and which could require the intervention of the incumbent's immediate supervisor to correct.	
3	<ul> <li>May include:</li> <li>Errors in keyboarding technical and budgetary material</li> <li>Errors in arranging appointments or meetings</li> <li>Errors in maintenance of petty cash accounts</li> <li>Errors in filing duties</li> </ul>	10
	Errors having a somewhat serious effect such as those which result in the University, and/or its employees and/or others, being considerably irritated and/or inconvenienced and which require the intervention of the immediate supervisor to correct.	
С	<ul> <li>May include:         <ul> <li>Errors in bookkeeping records of Departmental or Grant accounts which could result in overspending or under spending</li> <li>Errors in exercising signing authority for purchases (i.e., exceeding authority)</li> <li>Errors in marking multiple choice examinations</li> <li>Errors in ordering specialized items, material, documents, books, etc.</li> <li>Errors in filing in patients' charts and patient appointment scheduling</li> <li>Errors in students' or applicants' records which could affect the students' or applicants' status or admission</li> </ul> </li> </ul>	20

	others	having a serious effect such as these which result in the University and/or its employees and/or being extremely irritated and/or inconvenienced and which require the intervention of the n, Department, or Faculty Head or Senior Administration of the University to correct.	
ι	May ir	Misinformation or errors, written or verbal, which affect programs, academic staffing, students' academic status or status of prospective students/staff  Errors resulting in a major monetary loss or bookkeeping error  Errors in assessing, posting, crediting or otherwise accounting for students' fees and scholarship records  Publishing misinformation or misinterpretation of policy which could affect the University's public image  Errors at final points of control in Libraries	30

### **FACTOR 7 – RESPONSIBILITY FOR BUSINESS RELATIONS**

This factor measures the responsibility for exercising tact, self-control and persuasiveness, oral or written, in exchanging information, making explanations or securing co-operation. The rating is based on the contact work which occupies the greater portion of the employee's time or which is most directly connected with the principal functions of the job. The following points are taken into consideration: persons dealt with, frequency and purpose of contacts, effects of improper handling, nature of items discussed, need for explanation of facts or instructions, nature of contacts normally referred to others.

Responsibility for maintaining good relations with fellow workers or in written material which is normally routed to another person for signature is not recognized.

Degree ratings are designated as A1, B1, C1, for contacts within the University and A2, B2, C2 for contacts outside the University. In the case of job requirements under both "zones of contact", the degree rating with the higher point award shall apply.

DEGRE	EE	POINTS
A	No regularly delegated responsibility for communication with others, or responsibility is limited to exchange of information requiring little or no explanation or interpretation.  A2 may include:  Back-up or relief for initial contact person in unit or department	0
	<ul> <li>Contact with service representatives</li> <li>Regularly delegated responsibility for communication with others, requiring a sufficient degree of tact, self-control and persuasiveness in dealing with routine business situations.</li> </ul>	
	B1 may include:  Communication with faculty, staff, students, other university departments	10
В	<ul> <li>B2 may include:         <ul> <li>Initial contact person for external and internal visitors and telephone callers for a unit or department</li> <li>Communication with publishers or external suppliers via correspondence or telephone</li> <li>Communication with library users</li> <li>Medical secretary with patient contact</li> </ul> </li> </ul>	20
c	Regularly delegated responsibility for communication with others, requiring a high degree of tact, self-control and persuasiveness in dealing with involved work situations.  C1 may include:  Regular communication by Human Resources staff with University staff concerning personnel/payroll problems  Regular communication with faculty, Registrar's Office staff re: submission of mark return sheets, classroom scheduling, computer report requests  Initial contact person for University based patient appointments (e.g., University Health Services)	20
	<ul> <li>C2 may include:         <ul> <li>Regularly represents the University with the general public and community organizations, service agencies, etc.</li> <li>Regular communication in public relations capacity with media</li> </ul> </li> </ul>	30

# **FACTOR 8 – RESPONSIBILITY FOR CONFIDENTIAL INFORMATION**

This factor considers the integrity and discretion necessary in safeguarding confidential and restricted information to which an employee is required to have regular access. It measures this access to confidential information, which if improperly disclosed may produce adverse effects for the University, its students, staff, or other persons.

DEGR	EE	POINTS
Α	Required to work with material which contains little or no confidential elements. This degree also covers infrequent or minimal authorized access to confidential information, i.e., comprising less than 5% of the total job content. Reliance on personal integrity regarding confidential matters is understood.	0
В	Regularly required to work with standard confidential material, improper disclosure of which could have adverse effects.  May include:  Access to personnel/payroll records of applicants, students, or staff on a departmental level Access to details of appraisals/evaluations, e.g., course content, students, instructors Regular access to details of approved budgets, e.g., income, expenditures, balance Access to partial content (less than 1/3) of a single examination	10
С	Required to work with confidential material that is considered personal or sensitive and directly relates to the University community, improper disclosure of which could seriously affect the University, its staff, or students.  May include:  Access to complete admissions information on a Faculty level Access to more than 1/3 of any examination Access to information (authenticated or otherwise) relative to University operation prior to possible publication Regular access to financial contributions to the University and personal information on Alumni Access to case records (medical, dental, legal) on persons other than Dalhousie staff and student	15
D	Required to work with highly confidential material, improper disclosure of which would have serious adverse effects on the University and/or seriously affect employee relations or major University projects or programs.  May include:  Access to material dealing with negotiations, appointments, promotions, tenure and salary recommendations  Access to overall payroll/personnel information on University staff  Access to students' records in the Office of the Registrar  Access to case records (medical, dental, legal), more than 5% of which relate to identifiable Dalhousie staff and students  Access to major portion of examination material within a Faculty  Access to complete information on the University budget	25

# **FACTOR 9 – RESPONSIBILITY FOR DIRECTION OF OTHERS**

This factor measures the extent of the assigned responsibility in a job for the supervision or direction of other employees and the extent to which the employee is required to accept responsibility for the work of others. There are varying job requirements for planning, assigning and coordinating the work of other jobs and for instructing other employees.

A distinction must be made between assignment of work and the normal routing of work from one person to another according to an established routine.

DEGF	REE	POINTS
	Normally does not supervise. Might occasionally show another employee how to perform a task or may have some supervisory authority over other jobs for short periods of time.	
	May include:	
Α	Demonstrates activity without responsibility for subsequent performance	0
	Passes on instructions	
	Requesting assistance or backup as required	
	Performs some basic supervisory tasks in normal absence of supervisor	
	Involves close supervision and direction of employee(s) involving assigning a variety of routine duties, giving frequent instructions, checking and handling routine work and minor personnel problems.  Responsible for satisfactory performance of subordinates.	
	May include:	
В	Assigning of work according to priorities on a regular basis	10
	"Revising" work of others (libraries)	
	Regularly training staff on standard work operations  A sixting in any lasting of participants.	
	<ul> <li>Assisting in evaluation of performance</li> <li>Assisting in interviewing prospective staff</li> </ul>	
	Assisting in interviewing prospective stair	
	General supervision in which the employees being supervised assume some responsibility for their work. Employees know the routine work details and performance standards of the jobs, performing them without frequent checking by supervisor. Some subordinates may make work assignments to others.	
	May include:	
С	Overseeing effective functioning in area	20
·	Responsibility for effective training of staff	
	Assigning and coordinating work	
	Staff supervised may be in several locations	
	Regularly evaluating performance of employees	
	Directing complicated work requiring frequent assistance on individual work items	
	Direction of the work of others as in Degree C. Also establishes standards of performance and policies	
	of a general nature. Makes work assignments to employees with a variety of skills. Assigns objectives to be accomplished rather than setting specific methods for doing the job.	
	to be accomplished rather than setting specific methods for doing the job.	
D	May include:	30
	Supervising large number of staff	
	Interpreting and applying policies as required by operational necessity  Applying and include Degree Report of the policies as required by operational necessity.	
	<ul> <li>Area(s) supervised include Degree B or C supervisors</li> <li>Obtaining cooperation of other groups not under incumbent's supervision</li> </ul>	
	Obtaining cooperation of other groups not under incumbent a supervision	

# **FACTOR 10 – JOB CONDITIONS (ENVIRONMENTAL)**

This factor relates to conditions under which the job must be done over which the employee has no control and which may affect physical well-being.

DEGREE		
Α	Work performed under normal conditions with no risk and no predictable discomfort.	
В	Work performed under conditions without risk but with some predictable discomfort.  May include:  Computer monitor (60% of the time or more)  Heat or light or noise  Working conditions in proximity to unpleasant odors  Exposed to weather conditions 5% - 30% of the time  Regularly working with dirty objects, e.g., Archives	10
С	<ul> <li>Work performed with some personal risk and/or some unusual predictable discomfort.</li> <li>Heat or light or noise</li> <li>Work location near explosives and/or hazardous fumes</li> <li>Regularly carrying cash from one location to another</li> <li>Exposed to weather conditions 30% - 70% of the time</li> </ul>	15
D	Work performed under severe conditions.  May include:  • Erratic or excessive hours or work  • Exposed to weather conditions more than 70% of the time	20

CLERICAL AND SECRETARIAL					
<u>LEVEL</u>	POINT RANGE	JOB CLASSIFICATION			
C-1	0-175	Centrex Operator			
C-1	0-175	Secretary			
C-1	0-175	Clerk			
C-1	0-175	Clerk Typist			
C-2	180-205	Secretary			
C-2	180-205	Clerk			
C-2	180-205	Clerk Typist			
C-3	210-225	Secretary			
C-3	210-225	Clerk			
C-3	210-225	Clerk Typist			
C-4	230-265	Secretary			
C-4	230-265	Clerk			
C-5	270-300	Clerk			
C-6	305-335	Senior Clerk			
C-7	340-370	Specialist			
C-8	375+	Specialist			

LIBRARY			
<u>LEVEL</u>	POINT RANGE	JOB CLASSIFICATION	
LA-1	230-255	Library Assistant	
LA-2	260-285	Library Assistant	

PAY EQUITY				
<u>LEVEL</u>	POINT RANGE	JOB CLASSIFICATION		
AS-1	270-300	Administrative Secretary 1		
AS-2	305-335	Administrative Secretary 2		
LA-3	290-310	Library Assistant 3		