



Guide Book for Respondents to Questionnaire:

Laurentian University-LUSU, LUAPSA Job Equity Study

Version of 07 October 2013

1. What is this Study all about?

The University and its staff partners, LUSU and LUAPSA, have decided to take a fresh look at the work performed in the jobs represented by the partners.

This look includes giving staff the opportunity to describe fully all of the key aspects of their jobs. To enable the description, a questionnaire has been developed. It contains about 50 questions. This is not the big number it appears to be: every job has many features, from knowledge required to the working conditions in which staff do their work. To ensure a fair understanding of the work, each of those features needs to be explored. **Examples are important. Remember not to answer with just a “yes” or “no”.**

Remember that this questionnaire is about your work, that is the JOB rather than about you as a person or what you yourself bring to the job. The exercise is not designed to review the performance of an individual in their job. This means taking the “me” out of the job, to see it as someone else would.

This Guide Book is designed to help each respondent to the Questionnaire to give University-equity partner committee the best description possible of the ins and outs of their jobs.

Other committee messages give you more information about the study.

2. Why use the Guide Book in responding to the Questionnaire: GETTING STARTED

The Guide helps you to understand the structure of the Questionnaire. It is divided according to the features of work to be covered, that is the following twelve:

1. KNOWLEDGE SKILLS
2. PROBLEM SOLVING SKILLS
3. INTERPERSONAL SKILLS
4. PHYSICAL SKILLS
5. RESPONSIBILITY FOR PEOPLE LEADERSHIP
6. RESPONSIBILITY FOR RESOURCES
7. RESPONSIBILITY FOR ORGANISATIONAL OUTCOMES
8. RESPONSIBILITY FOR SERVICES TO PEOPLE
9. EMOTIONAL DEMANDS
10. SENSORY DEMANDS
11. PHYSICAL DEMANDS
12. WORKING CONDITIONS

The Guide gives you the DEFINITIONS for each feature—to give an idea of what is covered by the questions that are posed. For example, under “KNOWLEDGE SKILLS” there are four questions. They start with the content or subjects that the work requires and finally ask how you update your knowledge to keep current.

After the definitions come the SPECIFIC QUESTIONS. You will find suggestions to help you answer each question. The first question is headed “1.1” in both the Guide and the Questionnaire. When you are asked about content and subjects in the question, for example, the Guide will prompt you by listing the ILLUSTRATIONS of those contents.

Remember that these illustrations are only EXAMPLES. Your own job may cover other subjects and aspects of work. You do not have to give details on all the ones listed; only those that clearly belong to your own job, and any that you want to add.

GUIDE TO QUESTIONS:

1. KNOWLEDGE SKILLS

Definition: This feature focuses on the combination of knowledge and experience required to competently perform the job. It covers technical, specialist, procedural, product, organisational and conceptual knowledge, including numeracy, literacy, languages, theories, techniques, policies, procedures and practices.

Through this section, you are invited to describe the depth and breadth of the *total knowledge required for the job*, whether acquired through formal education, self-study, life experience, on-the-job training, work experience or some combination of these.

1.1. Consider, under “subject and content” the following:

- numerical and literacy skills (including specialized terminology)
- computer literacy required by the duties (e.g., needing various levels of a software package such as Excel)
- occupational and professional skills, concepts, ideas, and training
- the fields in which you work (e.g., administration, secretarial work, finance or bookkeeping, science, information technology, trades, etc.)
- other cultures or languages (for example First Nations)
- theories, techniques, policies, procedures and practices
- activities, processes, procedures or methodologies
- the legal framework that you must know and/or enforce (specific laws governing the job such as a labour code, federal and provincial legislation, or laws of which you must be aware or communicate)
- equipment, machinery, instrumentation or other technical materials
- the systems that you need to understand and interact with to carry out the duties (for example information systems such as software and hardware – at various levels from manipulation to design)

OTHER GUIDANCE:

- Be specific. If job requires “numerical skills”, for example, describe the **complexity** of numerical skills that the job requires. This complexity could range from “ability to add, subtract, multiply and compute percentages”, to “understanding calculus” – whatever is appropriate.

- If you think that the reader might not understand, *give an example* of how you use the skill in practice – whichever skills you are choosing.
- And remember, list whatever is required in the work.

1.2. The question refers to experience required by the work, not what you yourself might have. Consider the following:

- Experience in the field to which the job relates (see question 1.1 above), prior to coming to the University
- Experience in understanding the department, and the larger organisation of the University
- Experience with the details of the job and how it must be done
- Experience with the work of others to which the job relates (this may be called “contextual knowledge”, and can include both within and outside the University)
- Experience to provide regular “back-up” for others (but not including where “acting pay” is given)

OTHER GUIDANCE:

Explain the nature of the experience required. For example, if the job relates to banking, it may require experience in a financial institution outside the University. Alternately, the job might provide the opportunity to acquire that knowledge through experience on the job. Both might be needed.

- Explain the kind of knowledge that is acquired by the experience stated above.
- For guidance on how to describe experience, refer back to question 1.1.

1.3. Question on training and education required

- Can include formal licenses and certificates (for example, Chartered Accountant)
- Community college program graduation level
- University degrees
- Other – *always specify [e.g., specific kind of driver’s license; certificate in CPR, completion of training such as safety procedures]*

GUIDANCE:

- Refer to resources that have been provided – the hiring qualifications, for example, and the job description.
- The formal level of training that is actually required should be shown. If it is “desirable”, however, you can also include that, but indicate that it is desirable.
- If you are not sure of the precise training and education – for example, whether it still is what is needed – discuss the matter with your supervisor and/or union and association representative.
- You can also explain in the Questionnaire what training and education is required, and why. Relate your points to the duties of the job set out in the job description.

1.4. Keeping up to date

Consider the following:

- What has been, or is, changing in the work. Examples include
 - Systems such as those that are computer based
 - Techniques or methods
 - Information or data
 - Client needs
 - What is effective or efficient

- Lessons learned from experience
- Legislative changes and jurisprudence
- Means for keeping up to date
 - Specific study, including workshops
 - Professional or other journals and communications
 - Exchanging information about developments
 - Membership in an occupational or professional area

OTHER GUIDANCE:

- Relate the responses to duties.
- Include a brief description of *why* updating is needed
- Indicate, if it is helpful, what is gained by updating

2. PROBLEM SOLVING

This feature assesses the skills of creativity, adaptability (as to change, whether long-term or immediate), innovation, analytical reasoning and judgment required to solve problems typically encountered or that may occur in the coordinating, organising and planning required to achieve the job's or the organisation's objectives. Also considered is the complexity of problems, issues or activities undertaken in usual circumstances.

2.1. This feature includes the following facets that are required in the job:

- problem solving,
- analysis,
- adapting to a situation
- interpretation,
- evaluation,
- diagnosis,
- reasoning and
- creativity and imagining
- other mental processes

OTHER GUIDANCE:

- To begin, go to the duties of the job. Look for what *thinking process or processes* are needed in each situation implied by a duty. An example might be "ensure the safety of self and others in the laboratory". Implied could be analysis of procedures for handling chemicals and equipment, thinking about better safeguarding, designing training, etc. Another example (say, for a supervisor) could be to take analysis or diagnosis that someone else has performed and consider solutions.

2.2. Analysis and research required in relation to skills described in 2.1 above

GUIDANCE:

- Describe *when* further analysis and research is needed. An example could be that an individual has a need for service, but it is not clear whether that service can be provided. Thinking about adaptation of the service might be needed.
- Use the thinking processes noted in 2.1 as the reference points for answering the question

2.3. What is *new* or *recurring* in the solution or meeting the situation requiring thought

GUIDANCE:

- Indicate the situation(s) in the job requiring thought. Say whether it (they) happens more than once (so is recurring), or whether it has been new. Use the past year as a guide. The immediacy of the required thinking, or the longer-term thinking, should be described. (An example could be thinking about a solution to an urgent situation.)
- Describe what innovation has been required. Say how complex your thinking has been.
- Tie your description to the outcome, which could be a solution to a problem, or a recommendation, or something creative such as a design (that could be in a system, a procedure, method or response for example)

2.4. What resources are available to you in finding solutions or meeting situations requiring thought

Resources can include:

- manuals
- policies
- guidelines
- work practices
- professional standards
- expertise of others or contributions of colleagues or team members
- precedents and previous decisions
- the supervisor and/or manager, or others in administrative direction

2.5. Referral of problem or situation to others

Think whether the problem or situation is one on which

- For various reasons, others need to be involved. Reasons could include the implications of the possible response to the situation – for example setting a precedent.
- “Others” can include the supervisor or manager, a project or work team.
- Indicate *why* the referral is needed.
- Use your answer to question 2.1 above as your reference point.
- Where you do refer the problem or situation, indicate whether the job requires a contribution to the solution or other thinking. For example, if a team is taking up the matter, say how you participate in the team’s thinking.

3. INTERPERSONAL SKILLS

This feature assesses the level of communication and interpersonal skills required for competent performance of the role. It measures communication, including the need to communicate through means other than verbal exchange. The factor assesses the nature of personal contacts required with other people, including clients, customers, suppliers, government agencies, the media or peers in other organisations or professional associations, as well as relationships with other employees.

The purpose of the communication and interpersonal skills and the complexity or contentiousness of the material being communicated are both considered. The subject matter may be complex, sensitive, confidential or unwelcome. The factor also takes into account the nature, diversity, cultural background, size and receptiveness of the intended audience.

3.1 Whom you contact and why

- Clients of services – could be *internal* – students, faculty, co-workers, volunteers, for example; or *external*, such as visitors, suppliers, donors, community members, peers in the discipline in which you work
- *What is the purpose* for the communications?
- *How* do you communicate? (in writing, orally, in person, in one or more languages)

3.2 The role of these communications in your work

- Give examples of how communications have helped you get results
- The skills needed to communicate should be highlighted for each role or result. For example, the role might be providing a service to a student, where the skill involved might be counselling or being clear about aspects of courses.
- The point of reference for your responses to this question is 3.1 above.

3.3 The nature of the communications

“Nature” may be illustrated as follows, that they are:

- Fact-based, where the facts are clear and available
- More complicated facts that may be difficult to convey
- Sensitive in view of the personal nature of the communication or for other reasons
- Confidential to the person or party to the communication (for example, a plan or project not to be publicized or information sensitive to the individual)
- Possibly unwelcome to the receiver of the communication (for example, information difficult to understand or accept or conflictual, dealing with employee performance)

OTHER GUIDANCE:

- Highlight where communications are other than essentially factual. Examples could be that there are *barriers* to communication such as culture differences or differences in perspectives, interests or level of understanding of the subject.
- Also highlight where understanding of the recipient’s ability to receive communication is required, and why.
- Always remember to give *examples*.

3.4 Interacting with others from a culture that is not your own

This question is intended to elicit information about the extent to which your work requires engagement with other cultures.

Remember to highlight

- The intensity of the engagement required by the duties – from casual, provision of a service, social occasion for example to negotiating
- The extent to which the work requires both understanding of the other culture and adaptation of your communication as a result

3.5 Using a second language – and your job is designated “bilingual”

This question is intended only to enable a distinction to be made between the organisational requirement (i.e., “designation) to use a second language, and other uses as in the following question, 3.5.

Please indicate

- When you use the second language (e.g., with others such as students)
- The *complexity* of your use of the second language (e.g., responding to telephone calls, conversations, counselling; technical writing, editing)

3.6 Other uses of second or third languages

- Highlight the circumstances in which such language use is required.
- Refer to duties.
- Provide reasons for the language use, for example
 - Research objectives and scope
 - Provision of service
 - Working in a team
 - Providing support
 - Interpreting or translating

3.7 Other comments on specific skills

The question is intended to ensure that no interpersonal skills that are required and used in the job are missed.

These skills could include the following:

- Interviewing
- Counselling
- Reading body language
- Listening actively
- Fact-finding
- Showing empathy or understanding
- Adapting messages to diverse or varying audiences

In addition, if any of the *ways* of communicating have not been made clear, include them here and give an example – e.g.,

- Writing
- Making presentations
- Briefing
- Demonstrating or instructing

4. PHYSICAL SKILLS

This feature looks at physical or fine motor skills required on the job. Physical skills encompass manual dexterity, hand/eye coordination, coordination of limbs, manipulation and sensory skills. It takes into account requirements for speed, precision and accuracy in tasks requiring accurate coordination and fine motor movements.

Frequency of use of the indicated skills is not considered here. However, skills that may be required only in rare or unique circumstances should not generally be used to determine the appropriate level. If the demand for the skill is sustained over a period of time, that additional requirement will be accounted for in another feature of work, Physical Demands. Physical skills are about dexterity, coordination and fine motor movement skills, rather than the effort or energy expended.

4.1 Description of physical skills

These are skills for which *training* is required, either through a formal course of instruction, or through on-the-job training. It is not essential that the latter be formal, and it may be a replacement for instruction. Remember to refer to job requirements.

Examples of physical skills include the following:

- manual dexterity
- hand-eye co-ordination
- co-ordination of limbs (for example in driving a vehicle)
- manipulation and flexibility skills
- keyboard work
- heavy lifting (note the training required for techniques for safe lifting)
- manipulation of objects (or people, as in physiotherapy or guard duty)
- work with instrumentation, equipment or machinery
- surgical procedures
- dissection of specimens

4.2 Specific training

- Examples of such training include coordination required for Cardio-pulmonary Resuscitation, coordination to use a keyboard, to manipulate graphics software, or to use a camera; familiarizing the ear to signals from equipment or to music, dancing, using the body in athletic endeavours and sports.
- Experience can be substituted for formal training. However, there need to be specific goals for skills development.

4.3. Need for precision

- Requirements for precise application of a physical skill are usually evident in the nature of the work. For example, data entry requiring application of keyboard skills requires correct data input. Machining a part for an instrument or piece of equipment requires adherence to measurements of a particular tolerance.
- You should indicate the degree of precision (e.g., tolerance within a certain measure).

4.4. Requirement for speed in applying a physical skills

- Where there are specific standards imposed by the duties for speed, these should be noted, for example, court reporters may have to take note of proceedings at the rate of 400 words a minute. In athletics, the

goal may be to achieve one's personal best, reach or surpass a speed record. The requirement to change a theatre setting could require physical skills with speed.

- Note that often the greater the requirement for precision, the less the demand that physical skill be exercised with speed.

5. RESPONSIBILITY FOR PEOPLE LEADERSHIP

This feature assesses the leadership requirements of the position. Included is responsibility for direct line leadership, as well as functional control of staff, advisers, trainees, volunteers, consultants, contractors or other individuals whom the role can influence or for whom it has responsibility. Leadership may be in the form of direct management or supervision, functional guidance, professional leadership, coordination, technical influence or direction and/or specialty advice or any of many other forms of direct influence over the work patterns of others.

Note about "influence": Influence is causing or achieving action or work by others where direct control is absent, that is, causing others to act in a desired way without having direct control over them. These "others" can be either within or outside the organisation. This ranges from achieving immediate tasks to establishing broader habits of work or professionalism across the organisation or associated group. Other forms of leadership or influence include:

- project responsibility involving coordination with others, internal and/or external to the organisation
- consultative and advisory roles that have an impact on people and organisational operations
- technical or professional direction provided by a knowledgeable person or expert in a field or discipline to others for whom they have no formal responsibility.

5.1 Direct responsibility for the work of others

- "Others" include staff of the University, students, contractors, volunteers and trainees. Specify who is included in your direct responsibilities.
- Direct responsibility can include the following
 - Mentoring and giving guidance on work to be performed by team members
 - Project leadership
 - Direct supervision (see question 5.2 for details)
- Give details of "regular" responsibilities and "periodic" responsibilities under different headings where both are applicable.

5.2 "Supervisory" responsibilities—nature of supervision

- Supervision includes a range of specific responsibilities with respect to employees. A job may involve exercising a few or more such responsibilities.
- They include
 - employment of new staff
 - taking disciplinary action and/or firing staff
 - salary adjustments
 - negotiating employment agreement
 - assigning work and setting objectives
 - reviewing performance
 - designing or providing training
- Supervision does not necessarily mean making final decisions in these matters. If not, indicate where you make recommendations – under the following question (5.3)

5.3 Recommendations made

- See the last point of 5.2 above. Provide details of recommendations in relation to each of the supervisory responsibilities that apply in your job.

5.4. “Influence” over the work of others (as defined in 5.1 above) as required by the job¹

- The duties of a job may include giving advice to others about their work, or setting standards that shape others’ work. An example could be found in the field of financial administration. In some instances, a financial officer may set processes and standards for financial duties of others. Examples of such duties would be developing budgets, accounting for moneys spent and controlling revenue and purchases. The financial officer is said to exercise “influence”.
- Another example could be the standards that apply to written administrative work, its safeguarding and distribution. An administrative job may set those standards and thereby exercise influence.
- This kind of leadership is referenced in the last point in the introduction to this feature of work, above (“technical or professional direction”).
- Note that this may include both other employees and people outside your organisation.
- Provide examples, and specify who is influenced.

OTHER GUIDANCE:

Other examples of this kind of leadership through influence are:

- training
- development
- mentoring coaching or guiding others
- providing leadership/guidance on organisational or professional issues/outputs
- getting consensus/co-operation
- setting professional standards

6. RESPONSIBILITY FOR RESOURCES

This feature assesses the responsibility the jobholder has for control, management, acquisition, disposal, security or use of various resources. The range of resources extends from the most basic tools, equipment and information required for individual task completion to the broad spectrum of diverse material, intellectual and financial resources that make up the organisation. These resources are used by employees at all levels to achieve outputs and goals, but the degree of responsibility for them varies among those employees.

The feature measures the responsibility for three distinct kinds of resources – physical, information and financial. Some jobs will involve responsibility for more than one of these.

¹ This question does not include influence that may have an effect sometime in the future, such as that of teachers, lecturers, journalists, politicians, or other popularly influential people, on students/clients/customers.

6.1 Physical resources (listing)

- Include any of the following examples that apply: equipment and materials, physical plant, tools, instruments, buildings, gardens and life forms, roads, or other assets.
- Equipment includes office machines (e.g., computers, peripheral equipment) and laboratory equipment for example.

6.2 Physical resources (nature)

- Specify the nature of the responsibility in the job for each of the types of physical resources you have answered in 6.1 . That could be, for example,
 - handling, cleaning, maintenance and repair
 - security and confidentiality (including safekeeping)
 - deployment
 - purchasing and replacement authority
 - development of resources
 - issuing and tracking
 - preserving, protecting
 - storing
 - controlling access
 - quality control for use of the equipment

6.3 Information resources – listing

- Follow the pattern of 6.1 above, and include such information resources in your listing that apply -- information, data and records, for example.
- Describe each.

6.4 Information resources – *nature* of responsibilities

- This can include preserving, protecting, storing, collation, controlling access and quality control.
- Please specify and describe the extent of the responsibilities in your job.

6.5 Financial Resources – listing

- These can include cash, vouchers, debits and credits, credit card payments, invoices, budgets, grants, benefits and incomes and revenue, as well as investments.
- Please specify and describe the extent of the responsibilities in your job.

6.6 Financial Resources – *nature* of responsibilities

- Responsibilities can include handling, spending, allocating, authorising, saving, or making money, as well as verifying amounts and performing calculations and monitoring use or disposition of financial resources, and/or providing advice on any of these functions.
- More specifically, responsibilities may be checking for correctness and accuracy, safekeeping, confidentiality and security, deployment, cost control and budgetary responsibilities, revenue generation & investment opportunities and banking – decisions, analysis.
- Please specify and describe the extent of the responsibilities in your job.

7. RESPONSIBILITY FOR ORGANISATIONAL OUTCOMES

This feature assesses the nature of the job's impact on the achievement of the organisation's mission and outcomes, that is, its services to the organisation's clients.

While focused on external outcomes in most cases, the factor may also assess the job's impact on internal clients where there is a clear service relationship. The feature also reflects how much of the service outcomes the jobholder is responsible for.

7.1 Purpose of the job

- This question, giving the organisational context of your job, sets the context for further questions, which will enable you to provide information about the impacts of your work.
- Specify the purpose, mission or objectives as they are set for the department. Refer to documents that describe this aspect of the work.

7.2 Product or output from your work

- Consider both positive impacts or effectiveness and what happens when there are errors. With regard to errors, include only those that are probable.
- Describe and give examples of impacts, effectiveness or probable errors.

7.3 Freedom to influence outputs through decisions or actions

- Refer to question 7.1, where the objectives of your department are set out. Here, identify the outputs or products (e.g., particular service) from the department.
- Specify the responsibility of the job for those outputs or products, or resulting influence over them. That responsibility can be decisions, recommendations, actions, or influence.
- This description could include quality, timeliness, efficiency, effectiveness or scope of the output or products.

7.4 Responsibility for end products or outputs

- Another way of posing this question is: How much of the service outputs noted above are you responsible for?
- Provide examples of where you share responsibility and/or have the final responsibility.
- A simple example is a service of providing answers to enquiries, where the person giving information is responsible for it, but may have guidance in the form of a manual.

8. RESPONSIBILITY FOR SERVICE TO PEOPLE

The feature assesses the responsibility the jobholder has for the direct provision of services to individuals or groups of individuals; students, staff and faculty; customers and clients, patients, etc. While the main focus of the feature is on external service provision, services to internal clients are also acknowledged at the lower levels. It measures the nature of the service provided and the degree to which the service impacts on the person's needs and well-being.

This feature does not include any "services" that may be provided by a manager or supervisor or other leadership role to any reporting staff.

A table may be useful in completing the following questions to cover the dimensions required. The electronic version of the questionnaire will enable this option.

8.1 To whom services are provided

- Specify to whom you are giving services, and for each type of person listed above, describe the service.

8.2 Frequency of the service

- Provide examples of the frequency of the services to each type of client

8.3 Changes in the service

- Describe the extent to which the service you provide is changed, and indicate what changes happen over a one or two year period.

8.4 Responsibility for assessing the change

- It is important to describe the kind of assessment you may make of needs of clients and what you do with that analysis. Give specifics.

8.5 Impact of the service on the recipient of the service

- Describe the impact and provide examples.

9. EMOTIONAL DEMANDS

Emotional demands arise from working in a variety of situations in which pain, distress, anxiety, anguish, and other emotional conditions are a necessary part of the job context.

This can occur when working with people with communication difficulties or who are angry, difficult, upset, unwell or somehow difficult to work with or who require some form of care, protection, attention, instruction or assistance.

Emotional demands can also arise from work with those [including students, faculty and others] who may be stressed, suffering from isolation, mental disturbance or confusion and may present in unpredictable or disturbed fashions in some other way.

Note that stresses due to personal and working relationships, that can be resolved through organisation processes, are not to be considered in responding to this series of questions.

Consider also the ability to seek relief by breaking off from the task or performing less demanding tasks. The ability to break off from the distressing situation when desired indicates a lesser stress level.

Include stress arising from providing service to others, or from events, for example, deadlines and/or high workloads that occur on a regular basis, for example as the result of flux in the University, or a short-term change in requirements.

9.1 Description of emotionally demanding situations

- Provide examples, and indicate why the situations are emotionally demanding.

9.2 Frequency of emotionally demanding situations

- Think of your average week. One-third of the time would be about one and one-half days a week (about 12 hours).
- If no one emotionally demanding situation stands out, make a list of the situations, and arrange them into those that are frequent and those that are less so. Estimate whether either occurs one-third of the time, or less.

10. SENSORY DEMANDS

This feature relates to the demands for sensory attention, that is, concentration, alertness or focused attention required *by the job*. Sensory demands arise from the requirement to focus on an activity or process with an intensity where an interruption could have a negative impact. This could include activities such as listening, comprehending, watching, driving or thinking when applied in combination with one or more of the five senses (sight, taste, smell, touch and hearing) to a degree that results in mental/sensory fatigue.

This feature of work also includes the need to “multi-task”, as where a number of tasks must be the subject of concentration at about the same time.

10.1 Requirements to use the senses and to concentrate

- The five senses are listed in the definition at the beginning of section 10. Applying these in a concentrated way is most important in describing the sensory demand of the job. This question lays the basis for the next one, where you will rank these demands from least intensive (in terms of concentration) to the most intensive.
- Indicate for each where the work is subject to interruption or where tasks must be performed at about the same time. (Examples of multi-tasking could be driving a vehicle, having to provide services at the same time to a number of clients, or monitoring sound equipment in a meeting and monitoring verbal and other exchanges.)

10.2 Ranking the intensity with frequency

- First, rank the sensory demands in your job by how intensely you have to use one of the senses in concentrating. They should be shown from least to most intensive.
- Opposite each demand, show the frequency, that is, whether the demand occurs for one-third of the time or less, or more than one-third. Remember that one-third equals about 12 hours a week.

11. PHYSICAL DEMANDS

Physical demands cover strength and stamina required for strenuous or repeated use of muscles (including fine muscle movements). The factor takes into account all forms of bodily effort, for example, those required for standing or walking, lifting and carrying, pulling and pushing and other similar forms of exertion.

It also takes account of any circumstances that may affect the degree of effort required, such as working in a confined space or in an awkward position, for example, bending, crouching, stretching or holding a position for an extended period of time.

POINTS TO CONSIDER:

There are two aspects to this feature of work – the *intensity* of the effort involved, and the *frequency* or *duration* of the physical effort.

The focus of this feature is intensity and severity of the physical effort, rather than the strength or energy needed to perform the task as required by the job, as well as the continuity and frequency of that effort. One should also note if the job allows the ability to seek relief or perform less demanding tasks. The ability to break off from the work requirements or situation requiring attention as desired indicates a lesser demand for that attention.

11.1 Describing the physical activities in which you engage

- This question relates to the *range* of physical effort, by enabling you to list those activities.
- Physical demands include keyboarding and other fine motor movements, manipulating machinery and equipment, walking, running, lifting, carrying, pushing, pulling, crouching, bending, reaching, jumping and other activities.
- The question lays the basis for you to rank the activities in order by their intensity, that is, how much effort each of them requires. See 11.2 below.

11.2 Ranking the *intensity* and estimating *frequency* and *duration*

- Intensity means how much effort. Think about the fatigue that the effort causes when you engage in the activity. The total outlay of energy will be the result of looking at all three aspects set out here – intensity, frequency and duration.
- Frequency means how often, i.e., less than or more than one-third of the work day (as with above two effort features).
- Duration means how long the effort continues.

11.3 Taking a break from an activity

- It is more fatiguing if one must sustain a physical activity. This question illustrates the degree to which the work demands sustained effort. An example of the latter could be having to stand to take tickets for an event, where the work demands standing in one place for at least an hour. Taking students on a tour could also demand extended walking or standing. Having to enter data in a production situation could also demand sustained effort. Reading and responding to e-mails would usually not do so.
- Use the activities listed under 11.1 above, and pick out any that are sustained. Indicate why you cannot take a break, and how prolonged the activity is before the break.

11.4 The awkwardness of positions for extended periods

- The awkwardness of a position can produce muscle and joint fatigue. Examples of such positions could be working on cables under furniture, reaching into spaces to do plumbing. Other examples can include assuming an ergonomically uncomfortable physical position for sitting – over a microscope, or bending over children’s play equipment.
- Describe the positions, and indicate why the extended assumption of the position is awkward or fatiguing.

12. WORKING CONDITIONS

This feature covers exposure to recognised disagreeable, unpleasant or uncomfortable conditions or physical hazards arising from the work environment. Conditions and hazards are treated through separate questions. Through this section of the Questionnaire, you are able to describe those physical aspects of the work that you cannot control, yet are integral to the job being done.

Examples of disagreeable conditions include exposure to the glare of a computer screen, and to dust, dirt, and extremes of temperature, humidity, human or animal waste, grease or oil. Risks include those of illness or injury arising from exposure to diseases, toxic substances, machinery or work locations. The emphasis is on the degree of unpleasantness, discomfort or hazard caused. It also covers recognised risk of injury from other people, such as clients or patients.

12.1 Description of disagreeable conditions

- A longer list of these conditions would include exposure to inclement weather, to fumes or chemicals, a noisy environment (a student swimming pool or a student fair area could be examples), a workplace where the threat of risk is present [though hazards themselves should be described under question 12.3 below], poor lighting [though not normal office lighting meeting proper standards] or poor ventilation [again, not meeting normal standards] or isolation. *Note*, however, that the condition does not overlap with the Sensory Demands section (#10) above, where one looks to where smell (for example) must be used (e.g., classically the wine taster).
- The conditions can be either physical or psychological. *Note*, however, that the condition does not overlap with the Emotional Demands section (#9) above. Here, one is looking for the adverse effects of the environment, not psychological effort to deal with them.
- The conditions will be ranked by intensity in question 12.2.

12.2 Ranking by intensity, and showing frequency and duration of the conditions

- Follow the same thought process as for question 11.2: think of which condition is least disagreeable, which is most disagreeable. Then rank the others in between. For each, estimate whether the exposure is less or more than one-third of the time.

12.3 Description of risks

- Examples of risk are safety hazards inherent in the workplace, the threat of contracting an illness from exposure to other people or to physical injury. Think of situations where risks can occur, such as a domestic situation where violence or threat could occur; chemical spills or exposure to disease. Use of equipment can involve risks, such as repetitive strain injury or muscular or joint damage.
- Risks in the work are those that are probable. Only *likely* risks should be listed. Some disagreeable conditions can also represent risk, such as exposure to chemicals or physical or psychological threats in the workplace.
- This question sets the basis for question 12.4, where you will estimate the seriousness, frequency and duration of the risk.

12.4 Seriousness, frequency and duration of risks

- Risks pose greater threat physically or psychologically depending on their seriousness. Estimate how serious the risks described above in question 12.3. Then estimate how often, and for how long, each risk occurs.

13. What else needs to be added?

13.1 This section is important. Think of what you have *not* had an opportunity to tell us about your work in all of what you have written.

- Here are possibilities:
 - An indication of the legal framework for your job
 - The depth of the contextual knowledge of the organisation that the job demands when it is performed well
 - The extent to which new challenges are being posed by a changing client population
 - The thinking that is needed to adapt to changes in the cultural environment of the University.
- These are only listed to stimulate your thoughts. You may already have included them.

Finally, thank you for all of your care in telling us as much as you can about the many features and facets of your work. The completed questionnaire is very important for ensuring that the University-partner team understands your own work and what it demands, as well as that of others.

Having facts about jobs contributes invaluablely to our goals of a fresh look at the work and gives a fresh opportunity to arrive at a reasonable and equitable view about the value of all of the work.

Thank you!