



Employment Programs and Services

Guide to the
Employee Portfolio
For Management/Excluded,
OPSEU and PEGO

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OBJECTIVES OF THIS GUIDE

- To explain the purpose of and assist surplus employees in completing the Employee Portfolio (EP) used by Employment Programs and Services (EP&S), HR Service Delivery Division, to **facilitate and support the redeployment of Ontario Public Service (OPS) Management/Excluded, OPSEU and PEGO employees.**

PURPOSE OF THE EMPLOYEE PORTFOLIO

- The information collected in the EP is used by EP&S to match surplus employees to vacancies, and to identify bumping options for OPSEU and PEGO employees.
- The skills identified in the EP are matched to the skills requirements in the Job Information Package for positions available for direct assignment. The EP (except for Parts 1, 3 & 4) is shared with prospective Managers during the consultation process.

INTRANET ACCESS

- This Guide and the Employee Portfolio form are posted on the MyOPS site. Select 'Employment Transition Program' from the 'All Services' list, then access the 'EP for MCP/X, OPSEU, PEGO'.
- Applicable management policies, procedures and guidelines can be found at <http://intra.hropenweb.gov.on.ca/> (HR Open Web)

For alternate formats and information about specific procedures and resources, contact your Employee Mobility Coordinator/Human Resources Contact.

PARTS OF THE EMPLOYEE PORTFOLIO (EP)

The EP consists of standard documents developed and used by Employees and Managers in the redeployment process.

The EP contains a cover page and five parts:

Cover Page:	Employee Information
Part 1:	Personal Information
Part 2.1:	Portfolio Resume
Part 2.1.a:	PEGO Employee Preferences
Part 2.1.b:	Geographic Preference (OPSEU only)
Part 2.2:	Portfolio Skills Assessment
Part 3:	Addendum to Employee Portfolio (Management/Excluded only)
Part 4:	Displacement Information Record (OPSEU only)

COMPLETING THE EMPLOYEE PORTFOLIO

Step 1 - Cover Page

The cover page must be completed by your Employee Mobility Coordinator/Human Resources contact. The contact identified in this section will be notified by EP&S staff if any employment transition activity occurs for you.

Step 2 - Part 1: Personal Information

The Personal Information form is to be completed and signed by your Employee Mobility Coordinator/Human Resources contact. This includes information about your work location, current position title, etc., and can be obtained from WIN. You should review the information to ensure that it is correct.

The Redeployment Number is for Employment Programs & Services internal use only. Please do not fill in this field.

Step 3 - Part 2.1: Portfolio Résumé

The Portfolio Résumé is a summary of all of your work experience, education and training, licences, certifications, accomplishments, and achievements. **It is important that you complete the portfolio résumé even though a personal résumé is also attached.**

Step 4 - Employment History

The following information must be filled in:

- ≡ Describe positions you held starting with the current position.
- ≡ Indicate when the positions were held and what your status (permanent/temporary, full-time/part-time) was.
- ≡ Describe in detail the key responsibilities of each job and do one job per page.

Step 5 - Part 2.1.a: PEGO Employee Preferences

Geographic Preferences:

PEGO employees are automatically considered for vacancies, which are within 40 km of their headquarters.

You should list all the locations (towns, cities) across the province to which you are willing to relocate in addition to your headquarters. **Different geographic parameters for direct and conditional assignment opportunities may be selected.** Relocation expenses are not covered.

All matches beyond 40km are offered under mutual consent. This means that you may accept or refuse the assignment. However, refusal of a direct assignment will result in a loss of further rights as outlined under Article 14 of the PEGO Collective Agreement. Refusal of a conditional assignment means you forfeit rights to be considered for further conditional assignments but you continue to be considered for direct assignments.

Classification Preference:

As well as being considered for vacancies at the same classification, a PEGO employee may choose to be considered for direct assignment (conditional assignment not included) to vacancies at one level lower than his/her current classification. For example, if you are a PBE 08, in addition to vacancies/ at that classification, you may also wish to be considered for vacancies at the PBE 07 level. If that is the case, please indicate 'YES'. If not, then indicate 'NO'.

PEGO employees are considered for Voluntary Exit Registrations (VERs) at the same classification. These employees may also choose to be considered for assignment to VERs at one level lower. If that is the case, please indicate 'YES' or 'No'.

You can change your classification and/or geographic preferences at any time, provided a direct assignment has not been initiated.

Displacement Preference:

If no Direct Assignment has been identified after three months, you must be notified of any displacement opportunity, first within your ministry, within 40 kilometres of your headquarters, and then, if you wish, within your ministry, outside 40 kilometres. If you wish to be considered for displacement beyond 40 kilometres of your headquarters, within your ministry, please indicate 'YES'.

If not, then indicate 'NO'.

Please note that by indicating a willingness to displace beyond 40 km, you are agreeing to bump the least senior eligible employee *regardless of location*.

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Step 6 - Part 2.1.b: Geographic Preferences (OPSEU only)

OPSEU employees are considered for vacancies which are within 40 km of their headquarters.

You should list all the locations (towns, cities) across the province to which you are willing to relocate in addition to your headquarters. Different geographic parameters for direct and conditional assignment opportunities may be selected. Relocation expenses are not covered.

All matches beyond 40km are offered under mutual consent. This means that you may accept or refuse the assignment. However, refusal of a direct assignment will result in a loss of further rights as outlined under Article 20 of the OPSEU Collective Agreement. Refusal of a conditional assignment means you forfeit rights to be considered for further conditional assignments but you continue to be considered for direct assignments.

You can change your geographic preferences at any time, provided a direct assignment has not been initiated.

Step 7 - Other Relevant Experience

This section should be completed if there are other work activities (paid and unpaid) that you have been involved in and should indicate the skills developed while performing these activities. It is important to provide as much information as possible to ensure that all your skills are captured.

Step 8 - Education and Training

This section is to be completed if you have received education and training through formal, on-the-job, or continuing education courses. (e.g. OPS Staff Development courses, Community College/University degrees, Board of Education courses, etc.)

Step 9 - Accomplishments/Achievements

This section is to be completed if you have any other accomplishments, achievements either on your own or in a group. For example, member of a group to improve work procedures; co-ordinator, captain or canvasser of a ministry's United Way campaign; treasurer of the local 4-H Club; executive of the Queen's Park Public Speaking Club; member of conference committee for the Annual Wilderness Canoe Trip, etc.

Step 10 - Comments

Any additional information which you believe may be helpful in the assignment process including that which does not seem to fit into the other categories can be included here.

Step 11 - Part 2.2: Portfolio Skills Assessment

The Portfolio Skills Assessment is a required part of the EP used to describe your own skills. It is essential that the skill level chosen accurately reflects your skills and experience. **All** skills indicated must be supported in the Employee Portfolio résumé.

Managers will use a similar tool called the Job Information Package, to describe the skills needed for vacant jobs or registered voluntary exit positions. The two sets of skills will be matched by Employment Programs & Services, MGCS.

What are Skills?

Skills are the basic part of your knowledge, ability and aptitude you use to perform tasks everyday. You communicate with people, make decisions, and perform tasks at work. You may be involved in volunteer work that includes fund-raising, organizing activities, etc. Therefore, you may possess skills you don't think are important!

When completing the Portfolio Skills Assessment, think about your job-specific skills and any **transferable skills** you may have developed through other activities.

Transferable skills are skills that **you can use in different types of work**. For example, you may help organize a community function. You should think about all your experiences when filling out this Portfolio Skills Assessment.

When determining your skills, think about your various work experiences and other types of activities where you may have developed each skill. Refer to the skills and assessment definition before you decide whether or not it applies to you. If you have questions about how to identify your skills or levels, ask your human resources contact or career counsellor for advice.

Step 11 - Part 2.2: Portfolio Skills Assessment cont=d

There are two assessment levels, **functional** and **advanced**. They are described as follows and on each page of the skills assessment.

Functional

- ! To be able to understand and use the skill in a limited way
- ! Demonstrated working knowledge to perform the function

Advanced

- ! To be able to apply knowledge or skill in a variety of ways
- ! Demonstrated skills and experience to pass on this knowledge or skill to others (a resource for others)

For example:		
RECEPTION (OPERATE SINGLE AND MULTI-LINE SYSTEMS)		
<i>Provide customer service over the phone</i>	Functional <input type="checkbox"/>	Advanced <input checked="" type="checkbox"/>
<i>Provide customer service in-person</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<i>In this example, the employee has indicated that his/her phone skills are at an Advanced level and that his/her in-person skills are at an Advanced level.</i>		

You may check off as many skills as would properly represent your skills and experience. **However**, you must ensure that the skills you check off are supported by information contained in your Employee Portfolio Résumé. Read over the different skills in each category and review the definitions.

Step 12 - Additional Information

You may include any additional information that will explain or support your skills. For example, identify the type of software used for spreadsheets or word processing.

Step 13 - Other Skills

This section should be completed if you have critical skills that have not been identified in the Portfolio Skills Assessment.

Step 14 - Designations/Accreditations/Certificates/Licences

In this section identify any specific designations you may have. If you have a driver's licence, specify the type. As well, indicate any professional associations to which you belong.

Step 15 - Part 3: Addendum to the Management/Excluded Employee Portfolio (M/E employees only)

This form is to be completed by all classified Management/Excluded employees wishing to expand their direct assignment search parameters. Updates to this form should be provided if your circumstances change. This form is intended to capture information which ensures that Management/Excluded employees receive rights and entitlements as outlined in the *Operating Procedure for the Workforce Adjustment of Employees in the Management Compensation Plan and Excluded Category* available at <http://intra.hropenweb.gov.on.ca/>

If an Addendum is **not completed**, you will only be matched to positions within 40 km of your current headquarters and within 5% above and 15% below the maximum salary of your surplus position OR the maximum salary of your current temporary assignment if you have been performing work other than your surplus position for at least two (2) years. For more details, see the *Operating Procedure for the Workforce Adjustment of Employees in the Management Compensation & Excluded Category Directive*.

If you **refuse** a direct assignment or an interview to a **permanent** Management/Excluded or AMAPCEO vacancy within these parameters you **forfeit further rights** under the *Operating Procedure for the Workforce Adjustment of Employees in the Management Compensation Plan and Excluded Category* except for legislated severance payments. **Refusal** of a direct assignment or an interview to a **temporary** vacancy means you **forfeit rights** to be considered for further temporary assignments but you continue to be considered for permanent vacancies.

The following information must be filled in on the Addendum:

≡ The **Employee & Ministry Name**

≡ The **5-digit Job Code** (i.e., AGA17), the **5-digit Position Number** and the **6-digit Department/ID** (WIN). You may access this information from WIN. If not, your Employee Mobility Coordinator/Human Resources contact can get it for you.

≡ **Status:** Full-Time/Regular Part-Time

Note: REGULAR PART-TIME employees can also be considered for full-time vacancies. Check off the appropriate box. RPT employees may refuse a direct assignment to a full-time position without loss of redeployment entitlements.

≡ **Salary Parameter Preference (red-circling only within original notice period)**

You may select different salary parameters for permanent opportunities and temporary assignments. You are automatically considered for vacancies 5% above and 15% below the maximum salary of your surplus position or your current temporary assignment if you have been in a temporary position with a higher salary for at least 2 years. However, you have the option of expanding your salary parameters in increments of 5%. The upper limit cannot be greater than +5% above, but your lower limit can be less than -15% below the maximum of your surplus position. For instance, you cannot select a salary parameter of +10/-10%. However, you may indicate your willingness to accept a position that is, for example, -25% below the maximum salary of your surplus position.

Step 15 - Part 3: Addendum to the Management/Excluded Employee Portfolio (M/E employees only) cont'd

- ≡ **Geographic Preference.** You are automatically considered for vacancies which are within 40 km of your headquarters. However, you have the option of being considered for other locations in the province **in addition** to your headquarters. Different geographic parameters for permanent opportunities and temporary assignments may be selected. **Please note that relocation expenses will not be covered.**

Indicate your **headquarters**, and only the locations (towns, cities and/or regions) you are willing to relocate to **in order of preference**. **Headquarters does not have to be the first choice.** You may select whole regions as preferred locations.

Therefore, your redeployment area-of-search will include:

- K All locations within a 40km radius of headquarters
- K Any town or city or region listed as a Preferred Location

NOTE: You must accept an offer of a direct assignment or interview to a permanent position in any of the locations you list or **lose further rights** (transition support, recall rights, enhanced severance, consideration for future direct assignments, etc.) under the *Operating Procedure for the Workforce Adjustment of Employees in the Management Compensation Plan and Excluded Category* except for legislated severance payments. Therefore, identify only those towns, cities or regions to which you will relocate.

- ≡ Indicate if you have registered your position in the **Voluntary Exit Registry**. If you have received surplus notice your position is no longer available for matching and will be removed from the list.
- ≡ Indicate if you are currently on an **Acting Assignment**. The Employer will search for direct assignments based on the salary range of the current acting position, if you have been *in an acting assignment(s) continuously for two or more years and the maximum salary of the current temporary assignment exceeds the maximum of your surplus position*. Information about the current acting assignment is required at the time of surplus notice to ensure the appropriate parameters are used.
- ≡ Both you and your Employee Mobility Coordinator/Human Resources contact must **sign** and **date** the appropriate sections of the EP.

Step 16 - Part 4 - Displacement Information Record Form (OPSEU Employees Only)

Only OPSEU employees under notice of layoff who choose redeployment are to complete this form. This form is intended to provide the Employer with information about your employment history within the OPS for bumping purposes. The information gathered will be used by EP&S to determine if you have entitlements to displace outside your home Ministry if a bump is not available to you internally.

- ≡ Indicate if you want to displace beyond 40 km of your headquarters, within your Ministry.
Note: that for bumping purposes, you are not entitled to select preferred locations as you are for direct assignment. By indicating a willingness to displace beyond 40 km, you are agreeing to bump the least senior eligible employee *regardless of location*.
- ≡ Indicate if you have worked in another Ministry (or Ministries) prior to your present job. Complete the form by indicating the Ministry, location, position title, job code, dates held, and position status (full-time, part-time, etc.) for each job held.

Step 17 - Return the form to your Employee Mobility Coordinator/Human Resources Contact

Your Employee Mobility Coordinator/Human Resources contact will be able to obtain the CORPAY/WIN code for the position(s) you held in other Ministries.

The Employee Portfolio information forms the basis of Employment Transition data collected by Employment Programs & Services. Each Ministry, however, may require additional forms to be completed.

Step 18 – Signatures

The Employee's Signatures are required to certify that the information provided is accurate, and also, that you consent to the release of this information for the Government of Ontario, Employment Transition Program use only.

The Employee Mobility Coordinator/Human Resources Contact's Signature is required to ensure that the information has been reviewed with you.

NOTE: Your Employee Mobility Coordinator/Human Resources Contact will forward your Employee Portfolio to Employment Programs & Services.

