

Job Evaluation Guide for TMG

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Introduction

This guide provides an overview of the job evaluation process for positions in The Management Group (TMG). Managers are encouraged to contact their Human Resources office to discuss any upcoming job description needs and job evaluation requests.

Job Evaluation: Determining the Value of Each Job

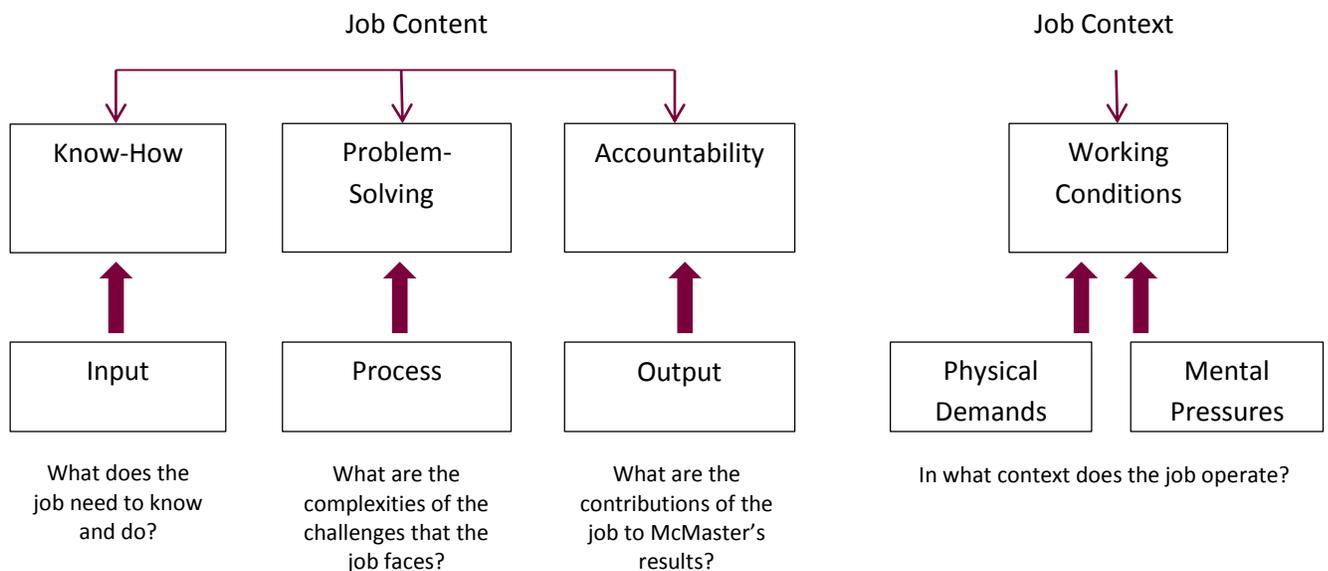
Job evaluation is a systematic method of determining the value of each job. Its purpose is to assess, in a fair, consistent and equitable manner, the relative value of jobs to establish and maintain internal equity. Job evaluation is intended to measure the job as it is defined at a certain point in time and assumes that the job is performed competently. Job evaluation does not consider how the job was defined in the past nor how it will be in the future.

Job evaluation is not designed to measure the qualifications, performance, potential or current pay of an incumbent employee nor is the amount paid by other organizations for similar jobs considered in job evaluation. These items are taken into account in the salary administration process.

The Hay Group Guide Chart-Profile MethodSM of Job Evaluation

At McMaster University, jobs in TMG are evaluated using the Hay Group Guide Chart-Profile MethodSM of Job Evaluation.

The Hay Group Method is the most widely used method of job evaluation around the world and can be used for all types of work. The figure below outlines the evaluation factors (Know-How, Problem-Solving, Accountability and Working Conditions) and provides information about the key consider in each.



The Hay Group Method complies with the Ontario Pay Equity Act which requires that the job evaluation tool be able to measure the factors of skill, effort, responsibility and working conditions.

Jobs Included in TMG

Jobs in TMG include managers with supervisory responsibility and employees without supervisory responsibility but who are exempt from the unionized employee groups due to the confidential nature of the work they perform. The determination of whether a job is in TMG is made by Human Resources.

Job Descriptions

Job descriptions have many important functions. They:

- serve as the foundation for recruiting, developing and retaining talent;
- set the stage for achievement by providing role confirmation and clarity;
- aid in identifying training and development;
- support performance management;
- illustrate potential career path options; and
- enable succession planning.

All members of TMG should have a copy of the job description for the position they hold. Managers are responsible for defining the job, writing the job description, and providing a copy of the job description to the incumbent.

Job descriptions are an important building block enabling the understanding of jobs. Job descriptions should be an accurate reflection of the role and therefore require review and update by the manager as jobs evolve and change.

When Should Jobs Be Evaluated?

- A new job has been designed.
- An existing position has undertaken a significant change (increase or decrease) in responsibilities and accountabilities since it was last evaluated. It is important to note that “more of the same or same type of work” or “doing the same thing differently or with different tools” is unlikely to result in a change in evaluation results.
- A department or unit is reorganized.
- As part of the regular updating and periodic review of job descriptions to ensure that job descriptions do not become out of date.

When a new job is designed or existing jobs undergo some change, the impact on other jobs should be considered. It may be necessary to review and update more than one position in a department in order to achieve a desired new structure and a unit or departmental reorganization may be required. Where changes affect multiple jobs, in order to facilitate the evaluation process, it is beneficial to submit all of the jobs undergoing change together.

Who Completes the Job Description?

The job evaluation process begins with the manager of the position who is responsible for determining the work that is to be performed and ensuring that the responsibilities of each TMG job within their unit or department are appropriately described in a job description and submitted for evaluation.

When a manager is considering submitting a job for evaluation, it is recommended that they first contact their Human Resources office for guidance. For departments in the Faculty of Health Sciences, managers should contact the Faculty of Health Sciences Human Resources office. For all other departments, please contact the HR Strategy Analyst located in Gilmour Hall.

The evaluation of jobs is based on information provided in the job description. The manager of the position is responsible for the completion of the job description and ensuring the information is an accurate reflection of the job responsibilities.

For new jobs where there is no incumbent, the job description should be written and signed by the manager of the position.

For a re-evaluation or review of an existing position where there is an existing incumbent, the manager may either write the job description and have the incumbent provide comment or the manager may have the incumbent write the initial draft and then review and finalize the job description. Either approach is acceptable. Where there is an existing incumbent in the job, they should sign the job description prior to its submission. Changes to the original job description should be clearly highlighted.

Required Approvals

Note that all job description submissions require two levels of signature. The manager of the position and the person they report to should sign the job description. Managers should adhere to any additional approval requirements specific to their area. For example, it is expected that in the faculties, the signature of the Director of Finance and Administration is required on all job descriptions. The manager's signature indicates that the information provided in the job description is a complete and accurate reflection of the job responsibilities. The second level approval indicates the approval of the job design, content and fit within the area.

Periodic Review of Job Descriptions

It is desirable that all job descriptions be reviewed by managers at least every four (4) years. If the job description is accurate, the manager should submit the job description with a newly completed job description signature page indicating that the description has not changed and the job responsibilities are confirmed. If the job description is no longer accurate or complete, the manager should update the job description and submit it indicating that the job description is being submitted for periodic review. Human Resources will track the date of submission of job descriptions and will contact managers regarding job descriptions older than four (4) years to initiate the periodic review process.

Submitting a Job Description for Evaluation

For departments in the Faculty of Health Sciences, completed job descriptions are to be submitted to Faculty of Health Sciences Human Resources who will work with the department to review the submission, suggest any modifications, and ensure all relevant information and material is available. They will then forward the submission to the HR Strategy unit, located in Gilmour Hall, who is responsible for the job evaluation process.

For all other departments, completed job descriptions are to be submitted to the HR Strategy Analyst in Gilmour Hall Room 304.

Upon receipt, the HR Strategy Unit will review the submission and follow-up with the manager or, in the case of Health Sciences with the Faculty of Health Sciences Human Resources office, if any additional information is required. Once any requested additional information is received, the HR Strategy Unit will arrange for the evaluation of the job.

The Job Description Form

The job description form is available here: <http://www.workingatmcmaster.ca/compensation/index.php>

The job description is structured to obtain information about the job to enable an understanding of the role. It's divided into sections including:

- Job Information
- Supporting information
- Reports to
- Department, Unit or Project Description
- Job Summary
- Accountabilities
- Qualifications
- Dimensions
- Working Conditions
- Leadership Capabilities

Job Information

The job information page provides basic information about the job, the reason for evaluation, employee information, and manager identification and approvals. Once evaluated, the job information page will be updated with the evaluation outcome. When completing this section, the job title used should describe the nature and level of the work performed and should align with the University's guidelines on titles.

The job description requires appropriate approvals before it can be processed. In most cases, the incumbent (in the case of a re-evaluation), their manager and that person's manager is required to sign the description. In many of the faculties, it is required that the job description also be forwarded to the Dean's office in order for the Director of Finance and Administration to review the job description and determine the appropriateness within the faculty. Be sure to adhere to any specific approval process,

beyond what's described here, that may exist in your area. Those who sign the job description are indicating their approval of the design of the job, the job content and the fit within their area.

Upon completion of the evaluation, Human Resources will add the following to the job description, for information:

- Leadership level
- Job Family
- Band
- Evaluation Date
- Mosaic Job Number

A copy of the job description with the above information will be provided to the manager of the job.

Supporting Information

The supporting information section provides space to explain the reason for the submission of the job for evaluation. An organization chart should be attached to each job description submitted for evaluation. The chart should clearly show all positions and the reporting relationships for all positions in the department. In the instance of a reorganization, it is helpful to provide both an old and new organization chart.

Reports To

Indicate the position to which the job reports.

Department, Unit, or Project Description

Provide relevant background that will help the reader understand how the job fits in your area and the context within which it operations.

Job Summary

The job summary allows you to summarize the overall responsibility of the role and to explain why the job exists. When completing the job summary:

- Concisely explain why the job exists. A short paragraph is normally all that is required.
- Provide an overview of the content, purpose and scope of the position in a paragraph.
- Remember that the job summary is meant to provide a 'big picture' view of the job by focusing on the reason the job exists and describing the overall job responsibility.

Accountabilities

This section allows you to describe the accountabilities and major functions of the job. Aim for 5-7 accountabilities. It may be helpful to organize the accountabilities using key job functions as headings. If the job is responsible for managing people, be sure to list this as an accountability and describe.

Qualifications

This section allows you to describe the qualifications required to perform the job. When completing this section describe the knowledge and skill that best describes the overall requirements to perform the job, however acquired. The qualifications should reflect the minimum, current requirement to perform the job competently. If you include assets, they should be identified as such.

Dimensions

This section allows you to provide relevant quantitative information about the size and scope of the job. Be sure to identify those dimensions upon which the job has impact and indicate whether the impact is direct or indirect. Typical job dimensions include:

- Staff Supervised – number and type of staff supervised
- Financial Accountability – budget details including operating, research, ancillary, discretionary funds and revenues or other pertinent financial information
- External Impact and Relationships – describe those most critical
- Operational – range and type of activities and services provided, number of people affected by the work, number of students the job affects directly or indirectly
- Administrative – management or attendance at committees as required by the job
- Programs or Projects Managed – number and type of programs

You can include others that are appropriate for the job.

Working Conditions

When completing this section, describe any working conditions that are a normal part of the job and are beyond that experienced in a typical office environment. Working conditions consider:

- Physical Effort
- Physical Environment
- Sensory Attention
- Mental Stress

Leadership Capabilities

McMaster's core leadership capabilities are designed to nurture employee engagement through best people practices. All leaders will demonstrate these qualities by: *Taking a Strategic Approach; Communicating and Collaborating; Developing People; Investing in Relationships; Championing Change and Innovation; and Driving Results*. The job description form for TMG includes these core leadership capabilities for information. These are intended to reflect an integrated profile of work and how it is performed. The leadership capabilities are the same for everyone; therefore, this section should not be edited.

The Job Posting Form

To facilitate the vacancy process, each job description will be supplemented with a job posting. Following the evaluation process, the HR Strategy Analyst will create the job posting and it will be provided to the manager for future use. The job posting will replicate information from the job description. In situations where the job description is lengthy, the information in the job posting may be condensed. The job posting form includes an additional information section where any relevant information can be added.

Tips for Writing Job Descriptions

- Focus on the job, not the incumbent.
- Use clear, concise language. Avoid using words that are vague such as 'prepare' or 'assist with' as they do not convey enough information. If you do use such terms, be sure to include an explanation as to what is involved.

- Describe the position as it exists today – not how it was in the past, or how it will be in the future.
- List the major job functions in the order of significance and importance.
- Structure each statement about the job to include: “Action Word” + “Subject” + “Specific Activities”. Here’s an example:
 - Create monthly budget reports by collecting and verifying financial data and entering information into spreadsheets
- It may be helpful to organize the job descriptions using the major functions as headers and provide a few explanatory statements for each.
- Be accurate in your description of the functions – don’t understate or overstate the responsibilities.
- If you use acronyms or abbreviations, use the full term the first time followed by the acronym or abbreviation in brackets.
- Remember that the Job Evaluation Committee will complete their evaluation based on the information provided in the job description. In describing the job, think about how to describe it to someone who may be unfamiliar with the job and department. A well-written job description should be easily understood by anyone who reads it.
- When writing job descriptions, less is more. A well-written job description that provides a high level summary of the major job functions will be clearer and more easily understood than a lengthy, wordy job description.
- The completed job description (job summary, accountabilities, qualifications, dimensions and working conditions section) should be approximately 2-3 pages in length.
- In the case of a re-evaluation of an existing job, it is very helpful to highlight changes to the job.

Generic Job Descriptions

A number of generic job descriptions will be developed to describe the standard for several positions. Once developed, should you have a job that is common throughout the University, there may be an existing generic job description that could be used in place of writing an individual job description. Generic job descriptions list the purpose and typical accountabilities of a representative job. These generics will also form part of the framework to which all other positions are compared. Available generic job descriptions will be posted here: <http://www.workingatmcmaster.ca/compensation/>. If you are considering using a generic job description, contact your Human Resources office about selecting a generic job description that fits your departmental structure.

Submitting a Job Description for Evaluation

Completed job descriptions are to be submitted as a pdf (with required signatures) and also in Word format. For departments in the Faculty of Health Sciences, submissions are to be sent to your Human Resources Consultant. For all other departments, submissions are to be sent to the HR Strategy Analyst in Gilmour Hall. Upon completion of the evaluation, the HR Strategy Analyst will update the job description with the leadership level, job family, band, evaluation date and HRIS job number. The update will be provided to the manager of the position by the Human Resources Office.

Job Evaluation Committee

The Job Evaluation Committee consists of six to eight members of TMG. The membership includes individuals from across the University to enable a sharing of a broad knowledge base of the University operations and the types of roles within TMG.

Job Evaluation Committee Meeting Schedule

Job Evaluation Committee meetings are held every second Wednesday. Submissions for evaluation are due by the preceding Thursday at noon. Note that where the submission is incomplete or clarification or follow-up is required, the evaluation may be held over pending receipt of the additional materials. A schedule of Job Evaluation Committee meetings can be found here:

<http://www.workingatmcmaster.ca/compensation/>.

Jobs are submitted to the Job Evaluation Committee on a first-come, first-served basis except in the case of job descriptions submitted for vacancies which are given priority over those submitted for re-evaluation or periodic review. The Job Evaluation Committee meets every two weeks. Therefore, the normal course of evaluation, once the description reaches the Human Resources Strategy unit, can take from two to four weeks to complete, depending on volume, committee schedules, etc. Please plan accordingly.

Communicating Job Evaluation Results

Once the evaluation of the job description has been completed, your Human Resources office will contact the manager with the evaluation results.

Requesting an Appeal

The manager may request an appeal of the evaluation outcome. The manager will attend a Committee meeting to present information about the job and answer any questions the Committee may have. The result of the appeal is final. Before requesting an appeal, the manager should discuss the evaluation outcome and plan to appeal the job with the person they report to and should adhere to any additional approval requirements specific to their area.

Effective Date of the Job Evaluation Outcome

Changes resulting from the re-evaluation of an existing job with an incumbent(s) will be effective the date the job description is received in Human Resources. If there are extenuating circumstances which caused a delay in the submission of the job description, back-dating of the results may be applied to a maximum of three (3) months.

Application of Results

Your Human Resources Office will work with the manager of the position to ensure applicable updates to the job, position and employee information are processed.

Roles and Responsibilities

Role	Responsibility
Manager	<ul style="list-style-type: none"> ▪ Determine the work that is to be performed. ▪ Complete the job description for newly created positions and jobs that require re-evaluation due to significant changes in job responsibilities. ▪ Where there are existing incumbents in a job, involve the incumbent to ensure the job description is accurate. ▪ Submit job descriptions for evaluation, ensuring that all applicable approvals and signatures have been obtained. ▪ Conduct a periodic review of job descriptions to ensure they are current. ▪ Liaise with the Human Resources office to provide any requested background or additional information that required to enable the evaluation of the job. ▪ Discuss the job evaluation outcome with the Human Resources office; determine whether to accept or appeal the outcome. ▪ In the case where an appeal is requested, attend a Job Evaluation Committee meeting to provide information about the job and answer any questions that the Committee may have. ▪ Discuss the job evaluation appeal outcome with the Human Resources office. ▪ Convey the evaluation outcome to existing incumbents. ▪ Work with Human Resources to determine appropriate adjustments to salary, in cases where there is a change in band. Salary adjustments must follow any applicable policy, guidelines and practices that may be in effect for TMG.
Director of Finance and Administration or Department Head	<ul style="list-style-type: none"> ▪ Serve as a resource for their areas on all matters related to job descriptions and their application. ▪ Oversee the design of jobs within the faculty or area. ▪ Encourage utilization of available generic job descriptions, where appropriate. ▪ Approve submission of jobs for evaluation.
Faculty of Health Sciences Human Resources	<ul style="list-style-type: none"> ▪ Work with the managers in the Faculty of Health Sciences to provide advice regarding their job description and evaluation needs. ▪ Liaise with the HR Strategy Unit to submit job descriptions requiring evaluation, follows-up with departments for any requested background information, communicates outcomes to the manager, discusses appropriate salary adjustment with the manager, and processes any resulting salary adjustments for existing incumbents. ▪ Communicate evaluation outcomes to managers. ▪ Provide advice on salary adjustments. ▪ Process job and any resulting salary changes for FHS departments. ▪ Prepare letter confirming job evaluation outcome for FHS departments.

Role	Responsibility
Human Resources Strategy Unit	<ul style="list-style-type: none"> ▪ Responsible for the job evaluation process for TMG. ▪ Facilitate the job evaluation process. ▪ Organize the work of the job evaluation committee. ▪ Communicate information and outcomes. ▪ Complete the job posting form following an evaluation of a job. ▪ Upon completion of the evaluation, update the job description form to reflect leadership level, job family, band, evaluation date, department code and Mosaic job number and return the updated job description to the department, or in the case of FHS departments, to the Faculty of Health Sciences Human Resources, along with the job posting form. ▪ Provide advice on salary adjustments. ▪ Advise manager of paperwork to be completed. ▪ Prepare letter confirming job evaluation outcome.
Human Resources Service Centre	<ul style="list-style-type: none"> ▪ Processes job and any resulting salary changes for non-FHS departments.
Employee	<ul style="list-style-type: none"> ▪ Understand the responsibilities of the job as outlined in the job description. ▪ Provide input to the manager on any update of the job description.
Job Evaluation Committee	<ul style="list-style-type: none"> ▪ Evaluation of job descriptions. ▪ Participate in the appeal of job evaluation outcomes. ▪ Participate in periodic reviews and audits of job evaluation outcomes.

Process Flow Chart

Appendix A provides a process map outlining the key steps in the job evaluation process for TMG.

Glossary of Terms

Appeal:	In situations where the manager believes that based on the outcome and relative ranking within the envelope that additional consideration of the job and its evaluation results are necessary, a request for appeal of the job evaluation outcome may be made to your Human Resources office. An appeal requires that the manager attend a job evaluation meeting to discuss the job and clarify information from the job description, where needed. The results of the appeal are final.
Benchmark Job:	Benchmark jobs are a selection of representative jobs within TMG and serve as the foundation for the job evaluation process. Jobs submitted for evaluation are considered relative to the benchmark jobs and their evaluations.
Internal Equity:	The relationship of a job's band and salary range when compared with the band and salary ranges of similar jobs within the organization. Internal equity is examined and assessed through the use of a job evaluation tool to evaluate and determine the relative value of jobs.
Human Resources Office:	For purposes of this document, the Human Resources Office refers to the Faculty of Health Sciences Human Resources for departments in Health Sciences, and, for all other areas, the HR Strategy Unit in Gilmour Hall.
Job:	The total collection of tasks, duties and responsibilities assigned to one or more individuals whose work has the same nature and level.
Job Description:	A document that summarizes the most important features of a job, including the general nature of the work performed (duties and responsibilities) and level (e.g., skill, effort, responsibility and working conditions) of the work performed. A job description should describe and focus on the job itself and not on any specific individual who might fill the job.
Job Evaluation:	A formal process used to create a job worth hierarchy within an organization.
Job Family:	A group of jobs having the same nature of work (e.g., engineering) but requiring different levels of skill, effort, responsibility or working conditions (e.g., entry-level vs. senior engineer).
Job Posting Form:	Each job description will have an accompanying job posting form which will be created by the HR Strategy Analyst following the evaluation of the job. The completed job posting form will be given to the manager and is intended to simplify and facilitate future vacancy postings of the position.
Leadership Level:	McMaster University endorses the philosophy that everyone has the opportunity to be a leader and has defined five (5) levels of leadership: <ul style="list-style-type: none">▪ Personal – individual contributor who provides service or support and may supervise students

- Knowledge – operational team supervisor, or an individual contributor, professional or subject matter expert who regularly collaborates with project teams, and may supervise students
- Strategic – oversees a function and/or team within a department or faculty; perspective is shorter term (1-3 years)
- Organizational – oversees multiple or complex functions and/or teams within or across departments and faculties; perspective is medium term (3-5 years)
- University – includes the President, Vice-Presidents, Deans and Senior Administrative Officers; perspective is longer term (5-10 years)

The leadership level of the job will be added to the job description and communicated to the manager of the position.

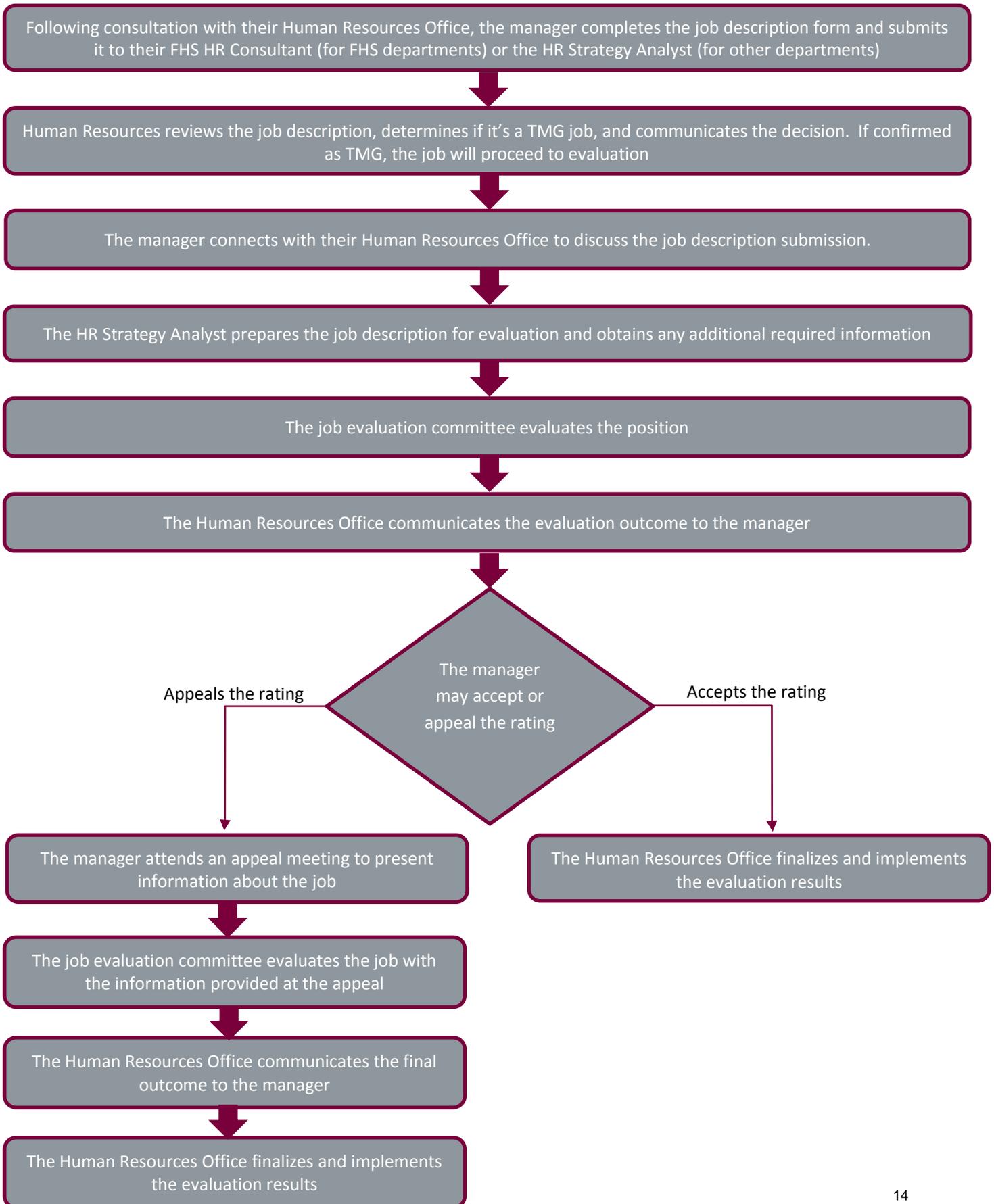
Manager:	For purposes of this Job Evaluation Manual, the manager is the incumbent of the position to whom the job reports.
Periodic Review:	Job descriptions should be reviewed by the manager at least every four (4) years to ensure they continue to be an accurate reflection of the job responsibilities. Where changes in job functions have occurred, an updated job description should be submitted for evaluation.
Position:	For purposes of this Job Evaluation Manual, position refers to a job that is performed in a specific area. For example, Administrative Coordinator is a job; the Administrative Coordinator in the department of Engineering Physics refers to a specific position.
Re-evaluation:	A job description is submitted for re-evaluation when an existing job has undergone a significant change (increase or decrease) in responsibilities and accountabilities since it was last evaluated.
Reorganization:	A reorganization occurs when more than one job in a department or unit are undergoing significant change.
Scope:	Describes the magnitude of accountability for the job. Scope is conveyed by providing some measure of size and could include: type and dollar value of budgets, size of the facilities managed, number of reporting staff, number of clients, and other indicators as may be appropriate to the job being described.

Helpful Resources

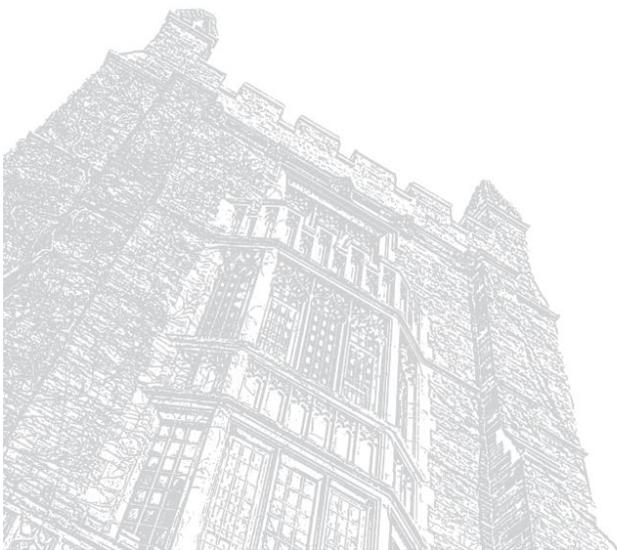
If you need information or assistance with understanding the job evaluation process for TMG, these resources may be helpful to you:

- For departments in the Faculty of Health Sciences please contact:
Faculty of Health Sciences (FHS)
Human Resources
Telephone: 22207
- For all other faculties or departments (excluding FHS), contact:
Human Resources Strategy
Telephone: 24607
- For online resources visit: <http://www.workingatmcmaster.ca/compensation/>

Appendix A: TMG Job Evaluation Process Map



Notes



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Human Resources Services