## Hay Job Evaluation

### Foundations and Applications

The Hay Method of Job Evaluation continues to be the most widely accepted worldwide, in use by over half of the world's 50 largest companies as well as in government, public, and not-for-profit institutions.

The process of evaluating jobs enables many important applications, such as designing effective organizations; clarifying interdependencies and accountabilities; managing succession and talent; and setting competitive, value-based pay policies.

**HayGroup**<sup>®</sup>

# WORKING PAPER

## Hay Job Evaluation

## Foundations and Applications

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#### Introduction

n the 1990s, the Internet and its parallel business boom fueled a war for talent, creating a belief that organizations either move at "e-speed" or risk being passed by start-ups with radically different business models. As a result, many organizations sacrificed disciplined processes that for years helped them control costs—especially pay-related costs. The even more challenging post-tech boom business environment, however, made those same organizations realize that any lost discipline meant higher costs, inconsistency, and a potential loss of defensible objectivity related to pay programs.

To ensure a reasonable balance between flexibility and control, Hay Group is working with many organizations to revamp the processes through which those organizations value work. One key driver is the need to reestablish discipline within compensation programs, and to better align pay with value creation—particularly at executive levels. Beyond that, our job evaluation processes help well beyond defining appropriate pay levels. Evaluating jobs not only provides consistent work value measurement, it also gives organizations a common framework and language to design jobs, define career progressions, analyze organization structures, and more strategically manage human resources.

This paper provides an overview of the Hay Guide Chart®-Profile Method of Job Evaluation and introduces a number of valuable applications. One key finding of our research with WorldatWork and Loyola University of Chicago (of more than 1,200 organizations) indicates that between 82% and 96% of organizations evaluate jobs, but only 18% proactively maintain their systems. Moreover, a majority reports that they believe approximately 20% of jobs are incorrectly placed within the job grading structure. As a result, we believe there is significant untapped potential to leverage job evaluation efforts to optimize organizational structures, develop people as key performers, and build employee commitment through reward programs that are fair, motivational, and competitive.

To ensure a reasonable balance between flexibility and control, many organizations are revamping the process through which they value work.



The Hay Guide Charts® are our proprietary instruments that yield efficient, consistent, and legally defensible evaluations.

#### So, Who Is Accountable?

A clear understanding of impact and its relation to overall accountability is critical when designing and evaluating jobs.

Consider the case of a major hotel chain CEO who ruled that the annual planning around "rack rates" for each property would be shared between the managers of national sales and operations. He reasoned that if he left it only to national sales, then the hotel managers would blame them if they did not achieve their goals. Likewise, if he delegated it just to the hotel managers, then national sales could blame the hotel managers if they failed to attract accounts to their properties.

Just when it looked like he had agreement, the Finance Director complained that she had the most critical information on past trends plus impact on profitability under different scenarios. She believed she should share in—or maybe even drive—the decision. The CEO, however, wisely decided that three people responsible for making decisions would slow the process. In addition, having the Finance Director make the decision would give the national sales reps and hotel managers an excuse to hide behind in not making their numbers.

Clearly, the Finance Director had to contribute to the decision. The national sales people and hotel managers could not make decisions without relevant financial information. By properly defining concurrent accountability, the CEO actually sped up decision-making and increased accountability for results. The "Impact" element when evaluating accountability can be segmented along four lines:

■ Ancillary. Informational, recording, or incidental services for use by others in relation to some important end result. Job activity may be complex, but impact on the overall organization is relatively minor. These jobs are usually involved with collection, processing, and explanation of information or data, typically required by others to make decisions impacting organizational results.

(continued)

## Hay Job Evaluation: Foundations

ay Group pioneered the "factor comparison" job evaluation method and modified it in its Guide Charts in the early 1950s. The Hay Guide Charts® are proprietary instruments that yield consistent and legally defensible work evaluations. Hay Group's job evaluation approach, in fact, is the world's most widely accepted—used by an estimated 8,000 organizations, including half of the Fortune 50 companies.

Organizations use the Hay methodology to evaluate jobs against a set of common factors that measure inputs (required knowledge, skills, and capabilities), throughputs (processing of inputs to achieve results), and outputs (end result expectations from applying inputs constructively). During the evaluation process, each job's content is analyzed relative to each factor and represented by a numerical value. These factor values are then totaled to determine the overall job "size." The various job size relationships, as well as the factor proportions associated with each job, can be useful in a number of organizational and human resource planning applications.



# Hay Job Evaluation: Factors

The input-throughput-output model is reflected in the Hay Method as Know-How, Problem Solving, and Accountability. Each grouping can be further broken down into eight elements for the work value assessment.

The output factor—Accountability—
is covered first, since every job is
designed to achieve predetermined
results. This factor typically receives the
least attention and weight in many
other evaluation methodologies.

#### Accountability

Every job exists to add organizational value by delivering some set of results (or outputs). Accountability measures the type and level of value a job can add. In this sense, it is the job's measured effect on an organization's value chain. It has three dimensions:

- Freedom to Act: The degree of empowerment to take action and the guidance provided to focus decision-making.
- 2. **Scope:** The business measure(s) the job is designed to positively impact.
- 3. **Impact:** The nature of the job's influence on business results.

- Contributory. Interpretive, advisory, or facilitating services for use by others in taking action. This type of impact is appropriate where jobs are accountable for rendering significant "advice and counsel" in addition to information and/or analysis and when decisions are likely to be made by virtue of that counsel. Such impacts are commonly found in staff or support functions that significantly influence decisions relative to the magnitude of various resources.
- **Shared.** Participating with peers, within or outside the organization, in decision making. This impact is used to describe horizontal, not vertical (hierarchical), working relationships. This type of impact is not totally controlling relative to the magnitude of the result. Shared impacts typically exist between peer jobs and/or functions, and suggest a degree of "partnership" in, or "joint accountability" for, the total result. For example, there may be shared accountability between engineering and manufacturing functions for a successful product. Sharing is also possible with "partners" outside the organization (e.g., between project manager and external contractor). When this impact is selected, it is important to clarify specific role contributions and to identify initiators as well as tie-breakers for decision making.
- Primary. Controlling impact on end results, where any contributing inputs are secondary. Such impacts are commonly found in operations and managerial positions that have "line accountability" for key end-result areas, whether large or small. For example, a supervisor may have "primary accountability" for the production or output (value added) of a unit within the context of available resources (e.g., personnel resources and controllable expenses); whereas the head of manufacturing may have a primary impact on total value added in the manufacture of products or on cost of goods manufactured. The key here is that the job exists to have the controlling impact upon certain end results of a given magnitude, and that accountability is not intended to be shared with others.

Every job exists to add value to the organization through delivering some set of results.



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#### Know-How

To achieve the accountabilities of a job requires "Know-How" (or inputs), which is the sum total of every capability or skill, however acquired, needed for fully competent job performance. Know-How has three dimensions:

- 4. **Technical/Specialized Skills:** Depth and breadth of technical or specialized knowledge needed to achieve desired results.
- 5. **Managerial Skills:** The requirement to undertake managerial functions, such as planning and organizing staff or directing and controlling resources, to achieve business results over time.
- 6. **Human Relations Skills:** The interpersonal skills required for successful interaction with individuals and groups, inside and outside the organization.

#### **Problem Solving**

The value of Know-How is in its application to achieve results. "Problem Solving" (or throughputs) refers to the use of Know-How to identify, delineate, and resolve problems. We "think with what we know," so Problem Solving is viewed as utilization of Know-How, and has two dimensions:

- 7. **Thinking Environment:** The job's context and the degree to which problems and solutions are defined.
- 8. **Thinking Challenge:** The nature of addressable problems and the difficulty in identifying solutions that add value.

Problem Solving measures the requirement to use Know-How conceptually, analytically, and productively.

The above factors can be modified in specific client situations, but the pattern around the three clusters relates to the inputs, throughputs, and outputs of the defined position.

Although the definitions of these job criteria have evolved over the more than 60 years they have been used, the underlying principles of Know-How, Problem Solving, and Accountability have been timeless as a general foundation for valuing work.

Our factors have also been widely accepted as a basis for setting fair and equitable pay practices, and are compliant with the U.S. Equal Pay Act of 1963 and Canadian



provincial pay equity legislation. (For more on this subject, see the sidebar on the Legal Aspects of the Hay Method of Job Evaluation.)

#### The Hay Guide Charts®

The Guide Charts are Hay Group's proprietary instruments that enable consistent work evaluations. Each of the above factors—Know-How, Problem Solving, and Accountability—has its own Guide Chart that reflects the subelements identified above (see Figure 1).

Each Guide Chart scale is expandable to account for the complexity and size of the organization to which it is applied, and the scale descriptions can be modified when appropriate. An important distinction is that the Hay Methodology can be calibrated to the value systems of other organizations within Hay's compensation databases. This enables a wide range of benchmarking activities, potentially improving the accuracy of market pricing and increasing confidence in job evaluation results.

#### Legal Aspects of the Hay Guide Chart®-Profile Method of Job Evaluation

The Hay Method can be a useful tool in meeting a global employer's legal and regulatory challenges. The Hay Guide Chart-Profile Method of Job Evaluation is genderneutral and has not been found to be discriminatory or unlawful in any reported legal decision.

Our factors have also been widely accepted as a basis for setting fair and equitable pay practices, and are compliant with the U.S. Equal Pay Act of 1963 and Canadian provincial pay equity legislation, which refers to job-to-job comparisons based on "skill, effort, and responsibility." Our method has been court-tested time and again, and has proven to be legally defensible since its inception.

Working conditions such as physical environment, hazards, manual effort, and mental concentration can also be added to account for job-context factors. However, many of these factors—unlike the three Hay factors identified above—can be potentially discriminatory, so there needs to be a compliant process to design and utilize supplementary factors alongside the Guide Charts.

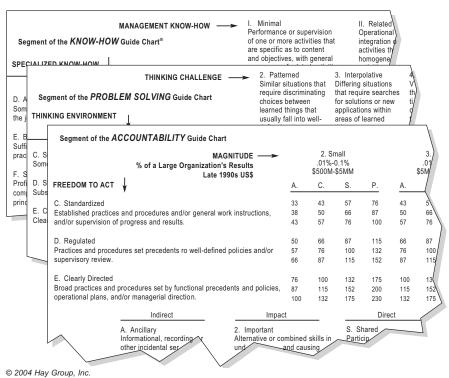
The Hay Method is the job evaluation method of choice of many public and private employers, mainly because of the strong belief that the Hay Method will serve them best if legal challenges arise. For example, the New Mexico State Supreme Court has established a compensation plan for all judicial branch employees in New Mexico, and has mandated by Judicial Rule that all such jobs must be evaluated in accordance with the Hay Guide Chart-Profile Method of Job Evaluation, so as to provide each employee equitable compensation.

Our methodology can be calibrated to the value systems of other organizations within the Hay databases.



A 15% step-value progression by job-evaluation factor represents the "just noticeable" difference between factors—especially as job content relates to pay.

Figure 1: Illustrative Guide Charts



We generally see differences in job size in terms of ratio differences rather than absolute unit differences, and the numbering pattern of the Guide Charts conforms with this principle, using a 15% step-value progression by job-evaluation factor to represent the "just noticeable" difference between jobs. Because of their importance in comparing jobs, just noticeable step differences are discussed in greater detail on page 9.

Guide Charts expedite the job evaluation process, but considerable expertise is required to understand the work's nature to determine the degree to which elements exist for each factor. The Guide Charts are a management tool, but as with all management tools, using the tool effectively requires expertise. This is analogous to using other management tools (e.g., internal rate of return or discounted cash-flow models) for making investment decisions. The power is not only in the tool, but also in the evaluator's knowledge and skill and the consistency in the tool's application across the organization.

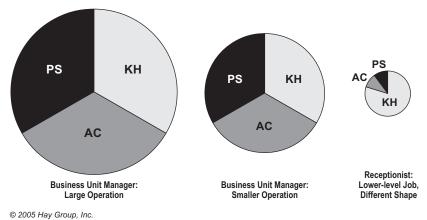


#### Job Size and Shape

The job's size and shape serve as starting points for many job evaluation applications. Job size is determined by the total of the factor point values for Accountability, Know-How, and Problem Solving, and reflects the job's relative value to the organization. The relative proportions of Accountability, Know-How, and Problem Solving that make up the job determine its shape (see Figure 2).

The balance between Accountability and Problem Solving reflects the extent to which the job is primarily concerned with achieving results (often late in the value chain), or is focused on research and analysis (often early in the value chain). For example, sales positions are commonly associated with having a high degree of Accountability relative to Problem Solving, and are accountable for selling products already developed. Conversely, early-stage research positions are commonly associated with having a high degree of Problem Solving relative to Accountability to develop new products, services, and processes.

Figure 2: Proportions of Accountability, Know-How, and Problem Solving



The balance among Accountability, Know-How, and Problem Solving reflects the level and type of work in an organization. For example, entry-level positions typically focus on Know-How. Accountability focus grows through career development into jobs that impact the organization more broadly through application of acquired experience and problem-solving capability. As jobs become more important, Know-How becomes more leveraged and focus shifts to utilization of Know-How to solve problems and achieve results.

The balance among Accountability,
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reflects the level and type of
work in an organization.



In entry-level jobs, Know-How may account for 70% of job content, while at the CEO level Know-How may only be 30% of job content (even though, of course, it is significantly more important than Know-How for an entry-level position).

The job shape concept is unique to the Hay Method of Job Evaluation. In addition to supporting job evaluation quality assurance, it enables further value-added applications of the job evaluation system—for example, providing a better understanding of how jobs fit into organizations, or better defining key work capability requirements.

A rigorous job-evaluation

process gives organizations a

common framework and

language to more effectively

design jobs within the

structure that best supports

its business strategy.

#### Applications of Hay Job Evaluation

he job evaluation process presents many other valuable insights, including a clearer understanding of the interrelationships of accountabilities, capability requirements, development needs, and, of course, setting competitive, value-based pay practices.

#### Organizational Design and Analysis

Many people presume that organizational structures are the result of systematic, methodical planning. However, in our experience, they evolve over time and are often shaped by personalities, politics, and compromise into complex mosaics of operating and support functions, business units, and internal alliances. The unintended consequence may be overlaps and/or gaps in key accountabilities necessary to meet core business objectives. In many organizations, jobs are designed with a functional bias rather than from an overall organizational perspective. Thus, when looking across an organization, accountabilities become unclear, important decisions flounder, and business processes bog down. The result: confusion and potential turf wars.

A rigorous job analysis and job evaluation process provides organizations with a common framework and language to more effectively design jobs within the structure that best supports business strategy. Strategic goals and objectives can then be clarified and distributed into job-specific accountabilities, to ensure that there are no gaps or redundancies. It also enables organizations to identify and align key interrelationships across critical business processes—especially when the benefits of doing so might not be immediately obvious to the parties involved. Organization and job design



must be integrally managed, just as automobile engine components must be designed to mesh under a variety of circumstances. Improperly integrated designs may cause an engine to fail. The same is true for organizations.

#### Step Differences

Steps of "just noticeable" difference can be used to analyze organizational hierarchy. In this context, we can consider the consequences of changes that have occurred as organizations moved to leaner structures. Figure 3 compares the "traditional" manufacturing hierarchy with a leaner structure typically found in similar businesses today.

Figure 3: Step Differences Between Traditional and Delayered Structures

Job Content Steps	Traditional Structure	Delayered Structure	
1	Manufacturing Director	Manufacturing Director	
2			
3	Production Director		
4			
5	Plant Manager	Plant Manager	
6	   Shift Manager		
7	Silit Manager		
8	Superintendent		
9	   Supervisor	Cell Leader	
10	Oupol visor		

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The steps of difference between the positions can be clearly measured through use of the Hay Job Evaluation Methodology. In a traditional structure, the distance between the work of a manager and subordinate is typically two steps, providing for a meaningful promotion between the levels. The distance between manager and subordinate in a lean structure may be four or more steps, making job content progression between the levels difficult, even impossible, for a top performing incumbent to achieve. Flatter structures often require career pathing opportunities that are horizontal (across streams of work) rather than vertical (within the function).

Since the recent economic downturn, a large number of jobs have been eliminated without a commensurate reduction in work, which means the content of many jobs

Most jobs are designed
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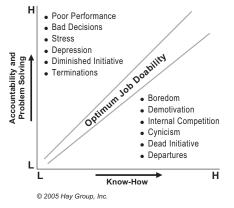
may have increased. Plus, employees still with the company assume accountabilities of remaining jobs, often without any rationalization or integration of existing accountabilities. Adding too many and/or unrelated accountabilities often creates distractions and confusion that limit job effectiveness.

#### Job Design and Analysis

When jobs are designed or changed, it is also important to determine whether or not a job is, in fact, "doable" (see Figure 4). We often see jobs change when they are designed around the unique capabilities of a star performer with high potential seeking increased challenges.

When jobs are designed or changed, it is also important to determine whether or not a job is doable.





For example, to expect an individual in a mid-sized organization to function as vice president of corporate development—setting new strategy, negotiating deals, and driving a growth agenda—while also managing a marketing department's day-to-day operations, can lead to serious problems. Although there is an apparent link between corporate development and marketing, the shapes of these

jobs—and thus the competencies necessary to achieve outstanding performance—are quite different, and the complexity of this role is substantial. Either the person will burn out, or let one or both jobs suffer. If unchanged, these jobs may be just too overwhelming or complex for the newly promoted incumbent.

It is important, of course, to examine the relationship between an organization's job requirements and the job position to ensure it is doable. The role demands in Problem Solving and Accountability need to be commensurate with the Know-How brought to the role. If the demands are too overwhelming, failure is likely. The new person may lack the credibility or experience required, and will likely become overwhelmed, frustrated, or focused only on a subset of the job accountabilities the incumbent can master.



Conversely, if the demands are minor relative to the incumbent's capabilities, there is a good chance that the incumbent will grow bored, demotivated, and/or push for accountabilities in others' domains and not add value commensurate to their pay level.

#### Job/Person Matching

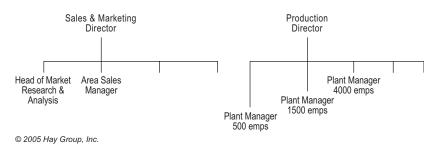
Hay Group's consulting experience and research reveals a strong link between the nature and shape of executive jobs and the competencies required to achieve outstanding performance. Understanding the work's scope significantly increases our ability to select and develop high-performing executives. Conversely, it also enables us to design jobs that increase the likelihood that the jobholder will succeed.

Consider the role of country manager in a multinational corporation. Traditionally, country managers were judged by profit-and-loss (P&L) responsibility, and enjoyed high degrees of autonomy and accountability. However, many highly complex businesses have transformed that role into one focused on adapting products for local markets and managing the political and regulatory landscape—with P&L now in the global president's hands. The country manager's role has, therefore, changed.

When such transformations occur, it is important to revisit job requirements to determine whether the incumbent remains a good fit. Focus then can turn to aligning the job requirements with jobholder motives. Although designing jobs around individuals is generally an ineffective practice, you must consider the motivational profile of a typical person who would fill the job over time.

For example, the two sales and marketing organization positions in Figure 5 have similar job sizes, but very different shapes. And the personal characteristics associated with success in these roles are also very different. Not surprisingly, most people who excel in sales positions do not necessarily excel as managers

Figure 5: Job Shape Sampling



Hay Group's research reveals
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outstanding performance.



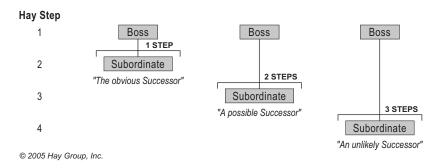
and vice versa—although both jobs add significant organizational value. On the other hand, our research and consulting experience reveals that the successful small plant manager has a high probability of also being successful at a similar, but larger plant. There are a finite number of job shapes that make it possible to use this concept to map role types across an organization.

#### Succession Planning and Development

Job size and shape also illuminate the nature of development. For example, it is probably easier to move the manager from a smaller plant to a larger plant than to move that same manager into a sales position. In the former scenario, the person understands the high-performance behaviors. The role is simply larger, not necessarily different. But the lateral move from a collaborative role to an action-oriented, target-focused role will mean deploying very different behaviors and skills.

Earlier, we explained the concept of step difference as an aid to judgments on jobsize relativities. When combined with organization structure analysis and job design, analysis of step differences between jobs within a hierarchy can also be used to assess the extent to which a job prepares one for the additional challenges of a more important job (see Figure 6).

Figure 6: Job Shape and Size Illuminates Development



A one-step difference between boss and subordinate roles means that there is a job that provides a good feeder situation for succession planning purposes. However, such a job may present a bottleneck to decision making. A two-step difference means that progression from the subordinate position to the manager's role is possible, but may be a stretch. Progression preparation greatly dissipates if the difference between roles is three steps or more.

There are a finite number of job shapes which makes it possible to use this concept to map role types across an organization.

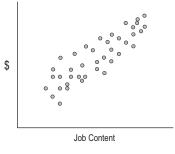


"Traditional" line structures typically incorporate two-step differences between manager and subordinate, with opportunities for internal succession. In leaner structures, vertical progression is less possible, and career development and succession planning should look to lateral moves and moves "outside the chimney" to secure future leadership development.

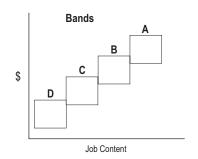
#### Pay Structures and Grading

Job evaluation is often used for—and is primarily associated with—assessing internal relativities and developing compensation administration arrangements that reflect the value-added contribution of specific roles. The relationship between job size and pay can easily be demonstrated in Figure 7. For salary administration purposes, this provides the basis for grouping jobs into grades and/or bands.

Figure 7: Job Size Relative to Pay



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Debate continues over the relative merits of traditional grades and broad bands. In the former, all positions are administered around a common midpoint or target salary. On the other hand, broad-banded structures may provide greater flexibility and often focus management's pay decisions more on individual capability than job size. Market anchors are often used for jobs within a band as a point of reference, while midpoints are used in graded structures to reflect internal equity as well as external competitiveness.

Note that broadbanding is likely to be more appropriate where a hierarchical organization structure is either flat or deemphasized in favor of a team- or project-based approach.

Analysis of step differences
between jobs within a hierarchy
can also be used to assess the
extent to which a job prepares
one for the additional
challenges of a bigger job.



Using the Hay Guide Chart-Profile Method brings further advantages in this respect, since it provides direct access to comparable market data. We design quality assurance processes to guarantee our methodology's consistent application, which also enables us to develop and maintain a compensation survey database that provides market comparisons by measured job size in addition to traditional job-model matching. Such comparisons prove far more accurate than comparisons based on job/title matching, even when controlling industry and organization size.

The Hay Method provides
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Such comparisons have proven
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job/title matching.

#### The Job Evaluation Process

s mentioned, our research shows that only 18% of organizations have proactive audit processes on maintaining job evaluation appropriateness. The balance of the organizations face inherent risks in using a reactive job evaluation review process—that is, responding to job evaluation change requests as they are made by line management. Over time, job levels across the organization tend to creep up if there is not a proactive audit process.

Job levels typically are easier to move up than down. In only responding to the so-called "squeaky wheels," an organization runs the risk of job level inflation over time, as well as inconsistencies between business groups based on who more actively uses the job evaluation process. Rolling proactive reviews should be performed at a functional or business-unit level every few years. These can go a long way in improving a job evaluation program's credibility and consistency, especially if it is performed in conjunction with a design and effectiveness review within the organization.

In addition, our experience demonstrates that effective job evaluation processes also validate added accountabilities to jobs by defining the incremental business value of these new accountabilities and their degree of alignment to organization objectives. If you transfer accountabilities from other jobs, then these processes typically determine the impact of a loss of these accountabilities from those jobs.



#### Conclusion

ob evaluation is alive and well. Leading organizations use job evaluation as a source of competitive advantage by improving the organization's ability to manage its investment in human resources with greater credibility, discipline, and fairness.

Job evaluation is not only about maintaining internal equity in the compensation program. It can facilitate organizational clarity, building capability, and establishing commitment through culture and rewards. It is a critical management tool, extremely useful in ensuring an organization's proper integration of strategy, culture, structure, process, people, and reward.

#### About Hay Group

ay Group is a global organizational and human resources consulting firm that helps its clients—Boards, CEOs, Executives, and HR Managers—on virtually all aspects of their people-related business issues. Founded in 1943, Hay Group has over 2,200 employees working from 77 offices in 42 countries. Our areas of expertise include:

- Design and analysis of organizations and jobs;
- Talent management through assessment, selection, and development of executives, managers, and teams;
- Compensation, benefits, and performance management;
- Executive remuneration and corporate governance; and
- Employee and customer attitude research.

Hay Group works with nearly three-quarters of FORTUNE's top-50 Most Admired Companies, as well as many mid-sized and non-profit corporations, public institutions, and governments.

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