

## 1. Purpose of Policy & Definitions

Job sizing is the process by which the grade for a particular role is established. It is an assessment of a role, not a person.

Job sizing is a management-initiated process, designed to align role design and work organisation with the operational needs of the University and ensure appropriate pay grades which recognise the value of the role.

## 2. Scope of the Policy

Job sizing arises in several different ways:

- When a new role is being created (temporary or permanent) with a duration of more than one year;
- When a vacancy arises in a role that has never been graded/sized;
- Where any changes are being made to an existing role that has become vacant (updating/refreshing/future proofing)
- Where a temporary role of less than one year, that has never been graded/sized, is extended
- Where a role that has not been graded in at least 4 years is considered by the manager to have materially changed in a way that could affect the grade, and there is an incumbent who has 4+ years service in the role who will be able to benefit from promotion without competition if the role is deemed to be at a higher grade.

The accepted job sizing methodology for the University is outlined in Schedule A which reflects the decisions made by the then Job Grading Review Committee on 1 July 2009 with the agreement of SIPTU.

The factors used when assessing a role are Work Complexity, Decision Making, Relationships, Capability, Impact and Supervision. Work volume on its own is not a consideration in the job sizing process except where it materially changes one of the other factors on which a role is sized

## 3. Process for Referring a Role for Job Sizing

The Job Sizing Committee normally meets on a monthly basis throughout the year and the dates of their meetings and the latest date for receipt of applications is published on the HR website at <http://www.ucd.ie/hr/a-z/jobgrading/>

College Principals/Heads of Schools/Units will, as part of their annual budget and workforce planning processes, and in response to organisational development initiatives, determine the administrative and support structure most appropriate to their particular service delivery needs. They will take a formal Organisation Design approach to this, supported by their HR Partner.

Where job sizing is required, the submission to the Committee must be made up of the following documents:

- A completed application form (where new) or a tracked changes application form where it is an existing role already sized. Application forms can be downloaded from the UCD HR website: <http://www.ucd.ie/hr/forms/>
- A copy of the proposed job description (where new) or a tracked changes job description, where it is an existing role already sized. A job description template is available from the UCD HR website under <http://www.ucd.ie/hr/forms/> job descriptions must be drafted in accordance with the university guidelines available from <http://www.ucd.ie/hr/resourcing/>
- A hierarchical organisational chart showing the position of the proposed new role and its relationship to other roles in the College/School/Unit and indicating the grades of each of the administrative roles in the College/School/Unit. For existing posts being reviewed, a similar organisation chart is required showing any changes in the organisational context in which the role operates, including changes to surrounding roles.

Incomplete applications, i.e. which do not contain the 3 documents listed above appropriately completed will not be submitted to the Committee, nor will additional documents be submitted unless expressly requested by the Committee as part of some clarification they have sought.

The Job Sizing Committee is unable to accept applications which are not received by each monthly deadline, due to volume and capacity considerations.

The effective date of the sizing of a role is the date the Committee reached a decision on it, normally the relevant meeting date.

## 4. The Role of the Job Sizing Committee

The role of the Job Sizing Committee is to consider all requests for sizing or re-sizing from College Principals/Heads of Schools/Units and to agree a grade for the role based on the Job description and application details submitted. The Committee has no role in respect of consideration of incumbents in roles which are being submitted with a view to promotion without competition.

The Job Sizing Committee ensures consistency in the application of job grades to administrative roles across the University, giving due consideration to the roles, responsibilities and requirements of particular roles and the organisational context of the work area.

The Job Sizing Committee will comprise the following membership:

- Head of School or other nominee of the President (Chair);
- Union representative;

- Senior member of staff of UCD HR

The membership and structure of the Committee will be reviewed from time to time to ensure that gender representation is maintained.

The Committee may, by agreement, co-opt one other member where it is felt that the co-opted member's contribution would enhance the quality of the Committee's deliberations.

The Committee may, by agreement, substitute one Committee member at any given time.

The deliberations of the Job Sizing Committee are to remain confidential to the members of the Committee at all times. The formal record of the meeting and outcomes will be a document signed by the members of the Committee and indicating the agreed scoring and grade for each role on which a conclusion was reached.

Where a sizing request is perceived to present a conflict of interest for a member of the Job Sizing Committee, that committee member should excuse themselves from the deliberations and a substitution may be sought.

Where the members of the Job Sizing Committee are unable to reach agreement in relation to a particular role (either re-sized or new), the Chair of the Committee will refer the role back to UCD HR who will determine what action to take in conjunction with the local manager.

## The Role of UCD HR Promotions and Grading

The UCD HR Promotions and Grading office is responsible for the overall operation and management of the process and specifically provides administrative support to the Job Sizing Committee. It is also the centre for advice on the Job Families Framework and provides guidance on how to incorporate and align job descriptions with the approved Job Families Framework.

It will:

- Check all applications submitted for job sizing to ensure that all documents have been received and are completed (*see section 3 of this document for a list of documents to be presented*)
- Forward all complete applications to the Job Sizing Committee for consideration at its next scheduled meeting
- Record the decisions made by the Job Sizing Committee at its meeting
- Communicate the decisions made by the Job Sizing Committee to the relevant College Principal/Head of School/ Unit
- Deal with all correspondence relating to the job sizing process
- Maintain a record of the sizing evaluation for each role considered

In addition, this office is responsible for providing an annual report and analysis of the patterns of applications and outcomes and making any recommendations that may be relevant for

enhancement or refinement of the process. It will review the process from time to time to assess its ongoing suitability in the context of the University's needs and will consult with stakeholders in relation to same.

## **5. The Role of the UCD HR Partner**

The HR Partner may provide overall guidance to the College Principal/Head of School/Unit on staffing strategies within the University/College/School/Unit and, where necessary, direct the College Principal/Head of School/Unit to the specialist staff in UCD HR, Promotions and Grading and UCD HR, Resourcing for procedural advice and guidance, as appropriate.

## **6. The Role of UCD HR Resourcing?**

UCD HR Resourcing, on request, will be happy to give advice to the College Principal/Head of School/Unit on drafting the job description which forms part of the application for sizing a role. Please refer to <http://www.ucd.ie/hr/resourcing/> for additional information. The involvement of UCD HR Resourcing in drafting a job description will not guarantee a particular grade when the application is reviewed by the Job Sizing Committee.

When a new or vacant role has been sized by the Job Sizing Committee, the College Principal/Head of School/Unit should contact UCD HR Resourcing about advertising the role.

## Schedule A

### Job Sizing Scheme Factors & Degree Definitions

#### 1. FACTORS

Factors are the elements of the job against which it can be evaluated and assessed. The six factors are:

- a. Work Complexity
- b. Decision Making
- c. Relationships
- d. Capability
- e. Impact
- f. Supervision

#### 2. DEGREES

The six factors are further sub-divided into levels to give guidance in job scoring to the level of demand, e.g. low, medium or high as required under each factor in the scheme. Detailed definitions of both Factors and Levels are contained below.

#### 3. OVERVIEW OF FACTORS AND LEVELS

##### a. WORK COMPLEXITY

This factor relates to ***the level of difficulty involved in the performance of the various tasks, which constitute the job.*** In some cases it may involve the use of equipment but generally it is concerned with organisation.

Complexity relates also to the ***range*** and ***depth*** of tasks; setting of priorities; handling of detail and issues arising from ability/capacity (as opposed to capability required to carry out a particular task) to appreciate and assist the academic and/or other objectives of the University or, where relevant, to help staff or students to attain their objectives.

LEVEL	DESCRIPTION
1	Activities comprising routine tasks of identical cycle with restricted and clearly defined range of outcomes and methods.
2	Standardised activities involving choice of action with limits specified by practice or instructions. Planning content and setting priorities within the limits of the job itself.
3	A range of tasks requiring a variety of skills and the exercise of initiative within clearly specified limits.
4	Working in a widely defined and reasonably complex area of activity. Work tasks encompassed would imply operating substantially without a well defined, predetermined range of actions. Work is performed in

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	an environment where there is an absence of known standards and, as a consequence, new standards have to be developed involving frequent exercise of responsibility and initiative.
5	Job tasks ordinarily involving complex activities which impact/impinge on other areas and/or are fairly crucially related to key objectives of the University, i.e. performance or control of work of significant complexity or importance requiring an extensive measure of initiative and responsibility.

## b. DECISION MAKING

This factor relates to the necessity **to take independent action**. It involves the **exercise of a choice between alternative lines of action** or, where relevant, **the giving of advice on action** to be taken, or courses to be followed, which in some circumstances, means advising on courses of action to be avoided.

The amount of supervision, given or received, has a bearing on the level of decision-making. Decisions may be uncomplicated, based on clear instructions or precedent or may require a little know how or experience of the tasks in hand.

Other decisions are carried out under more general directives and are concerned with their application to specific situations. More complex decisions require the co-ordination of information, the use of judgement and/or initiative and are generally based on complete information.

Decisions of a significant nature are taken within the context of broad organisational objectives and/or specified resources or in circumstances where the consequences are not totally predictable and require critical evaluation and a high level of judgement and/or initiative.

LEVEL	DESCRIPTION
1	Job is carried out under clearly set out instructions. Decisions are of a routine nature. Very little initiative required.
2	Job is carried out under indirect supervision. Decisions are made relevant to the workings of the specific job. Initiative is used on a day-to-day basis.
3	Job is carried out with little or no supervision. Decisions are made over a set range of issues (usually incorporating a specialised knowledge of University procedures) under broad general directives of a superior officer.
4	Job requires co-ordination of information from a wide variety of sources. Decisions are <i>generally required to</i>

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	<i>be made</i> on the basis of complex incomplete information. The <i>synthesis</i> of acquired specialised knowledge and “know how” to deal with problems, people or situations is implied in this level. The demand level would be in excess of work such as <i>appreciation of or normative application</i> of University rules and procedures. A high level of responsibility and initiative is implied in job functions assigned.
5	Job involves a designated responsibility for contributing to the <i>process</i> of policy formation and/or a key role in helping to set or contribute to corporate objectives. Decision-making is of a significant nature.

## c. RELATIONSHIPS

This factor deals with responsibility for dealing with other people, i.e. interactions, both inside and outside the organisation. It relates to those ***contacts which are essential for the proper performance of the job.*** Contact may involve imparting information, answering queries, making appointments or seeking facts or information required by the organisation. They also include contacts with individuals or groups of varying levels or interests in which highly developed social, persuasive, counselling or other interactive skills are necessary to carry out the work. ***The scope, level or frequency of any such relationships*** is important to the performance of the job. The levels should give due consideration to the frequency of contact, how it is made, whether it involves exchange of information or influencing or negotiating with others.

LEVEL	DESCRIPTION
1	Contacts within a small group of staff in the same School/Unit or in similar jobs, or contact with a wide range of people on routine matters.
2	Dealing with a wider range of people, e.g. contacts necessitated by the provision of routine services to peers (inside/outside University), immediate supervisors, working colleagues (mainly non-controversial contacts with people). Contact with staff in different areas of the University or other organisations where information is exchanged and has to be relayed effectively. Contacts of a “formalised” nature, e.g. may involve attendance at meetings or committees, mainly for the supply and exchange of information, may require executive/administrative follow-up/servicing of meetings.
3	Giving or receiving complex information and/or advice and guidance on a regular basis and analysing, applying and adapting that information, both inside and outside the University; may involve sensitive contacts



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	at supervisory or other analogous levels.
4	Continuous operational contacts involving generating trust, getting co-operation/work done through colleagues and others or facilitating non-directive action involving persuasion, tact and diplomacy, e.g. committee membership, i.e. discussing matters where differences of opinion are normally expected or work where delicate empathetic relationships need to be engendered.
5	Frequent contacts of considerable <i>complexity</i> and <i>significance</i> , which ordinarily involve liaising with senior staff inside or outside the University and which require highly developed and frequently specialist skills. Alternatively, contacts and interactions involving the role holder using professional or quasi-professional skills of a <i>high order</i> .

## d. CAPABILITY

This factor appraises the ability of the individual to carry out the demands of a particular role.

LEVEL	DESCRIPTION
1	<p>Work is of a routine nature or is based on clearly set-out procedures that can be easily communicated and understood. The role requires:</p> <ul style="list-style-type: none"> <li>• Knowledge of the tools required to operate in an office environment</li> <li>• Ability to communicate effectively, provide a good level of customer service and to complete tasks to a given time line.</li> </ul> <p>Previous role related work experience is not required but the individual filling the position should be capable of successfully undertaking the activities following a short period of familiarisation training.</p>
2	<p>Predominately work within predetermined structures of a cyclical nature with instances of non-routine. The role requires:</p> <ul style="list-style-type: none"> <li>• Specific awareness of work related processes and systems applications;</li> <li>• Demonstration of a high level of organisation and coordination skills, a strong commitment to follow up/customer service delivery and strict attention to detail;</li> <li>• A good understanding of University structures and how they are related;</li> </ul>



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	<ul style="list-style-type: none"> <li>• The ability to exercise sound judgement and influence in order to achieve objectives;</li> <li>• The ability to organise own work and prioritise effectively.</li> </ul> <p>The role may require some basic up-skilling or conversion training in order to maintain up to date knowledge.</p>
3	<p>The tasks are varied in nature. While there are predetermined cycles in the role, a high degree of proactive thinking and initiative is required. The role requires:</p> <ul style="list-style-type: none"> <li>• A good understanding / integrating overview of the University organisation and the underlying interdependencies as well as knowledge of Academic Governance processes.</li> <li>• The ability to support the development and implementation of strategy / standards / policy formulation;</li> <li>• Strong relationship building and the ability to work with groups and individuals from diverse backgrounds (e.g. cross functional committees);</li> <li>• The ability to work within a project environment;</li> <li>• Strong commitment to customer service and to its on-going improvement. A sound understanding of the importance of the UCD brand and reputation, and University/College/School/Unit strategy and objectives</li> </ul> <p>Adaptation of learning and experience from previous roles.</p>
4	<p>The role requires:</p> <ul style="list-style-type: none"> <li>• Application of extensive knowledge, skills or expertise in a designated specialism or in more than one area;</li> <li>• A degree of conceptual thinking in the formulation of strategy and policy guidelines through the application of well founded and accepted principles;</li> <li>• An in-depth working knowledge of the University and/or functional area.</li> </ul> <p>The output of the role is generally complex and requires the ability to assimilate and integrate information from a wide range of sources, both internal and external, allied to customer and service excellence</p>

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## e. IMPACT

This factor relates to the overall influence that the role has on the operation of the organisation. This influence can apply to a number of differing elements of the organisation's activities including: Financial; Customer Service; Stakeholder Relations; Legal and Compliance matters; Human Resources including Industrial Relations; Environmental Concerns; Health and Safety; Brand and Reputation.

LEVEL	DESCRIPTION
1	The role operates within very tight procedural limits and rules. There is little contact between customers and other key stakeholders and/or this normally occurs via an intermediary role. The role does not involve any potential for financial loss or exposure. Risks associated with the role are immediately apparent and have only a negligible and short term impact on a very limited number of others.
2	The role involves choices that have a primarily temporary impact on the organisation – either positive or negative. Any risks associated with the execution of the role can be managed in terms of <ul style="list-style-type: none"> <li>• existing approved budget</li> <li>• the issue is contained within the University</li> <li>• initiating a process improvement</li> </ul>
3	The role involves choices that can have a more long term impact on the organisation – either positive or negative. The role carries moderate expenditure limits. Actions undertaken in the role may result in loss or gain in terms of valuable resources (monetary, human etc.) to the University. Failure to carry out the role as designed may result in the undermining of policies, procedures and standards. Any risks associated with the execution of the role can be managed in terms of <ul style="list-style-type: none"> <li>• additional funding outside the approved budget</li> <li>• the issue becomes visible outside the confines of the University</li> <li>• reassignment of / training interventions for subordinate roles.</li> </ul>
4	Where the role has a significant influence on the Strategic direction of the University in terms of Policy setting, business planning etc. Actions undertaken in this role can have a significant impact – positive or negative - on the Brand/Reputation of UCD. The role may carry significant expenditure/procurement limits along with the possibility of influencing the financial status of the University either positively or negatively.

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## f. SUPERVISION

This factor relates to the responsibility for other people's work or performance and the number and level of such staff whether supervised directly or indirectly. The amount of supervision exercised takes account of the overall responsibility of the role.

LEVEL	DESCRIPTION
1	Role does not have any other organisation roles reporting to it. However on occasion the individual filling this role may have to exhibit supervisory related behaviours e.g. directing others in respect of specific details of certain tasks. Examples of such circumstances is dealing with short term temporary staff/seasonal workers etc.
2	Supervision of day-to-day work assignments in accordance with instructions and/or regular requirement to supervise groups of temporary staff.
3	Initiation of work within a section: <ul style="list-style-type: none"> <li>• delegate as appropriate</li> <li>• supervise work of a fairly complex/on-routine nature</li> <li>• control others who supervise routine work.</li> </ul>
4	Control of others who supervise staff on complex work, or other skilled/specialist staff.

Approved by the Job Grading Review Committee 1 July 2009

Agreed by SIPTU 14 July 2009

Job Grading Committee agreed changes to the Scope of the Policy in June 2012.

Job Grading Committee agreed changes to the Scope of the Polciy in September 2014

## **Schedule B – Scoring System**

Determination of Job Sizing Outcomes

The job sizing methodology is outlined in Schedule A and is in accordance with the previously agreed Job Grading Scheme. The methodology may be reviewed, following consultation, to ensure that it accurately reflects the demands of the family of jobs that it encompasses.

By applying the methodology, each evaluated role will be assigned a points rating indicating its relative work value. Weighted points will be allocated as follows:

FACTOR	DEGREE DEFINITION LEVEL									
	1	1.5	2	2.5	3	3.5	4	4.5	5	Max.
Work Complexity	80	125	170	215	260	305	350	395	440	440

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Decision Making	80	125	170	215	260	305	350	395	440	440
Relationships	74	101	128	155	182	209	236	263	290	290
Capability	45	67.5	90	112.5	135	157.5	180	*	*	180
Impact	45	67.5	90	112.5	135	157.5	180	*	*	180
Supervision	30	45	60	75	90	105	120	*	*	120

Maximum Points Score 1650

\*The maximum number of points assignable against this factor is indicated in the column for level four.

## Half Integer Scores

Half integer scores are used in a very limited number of cases where the factor description does not correlate with the specific duties and responsibilities of the role in that the score appears lower than merited, and elevation to the next level is also deemed to be inappropriate.

Based on the assigned points rating, the following grades will be applied to administrative roles across the University:

GRADE	POINTS RANGE
Senior Administrative Officer 4 (SA04)	1,351 – 1,650
Administrative Officer 1A (AO1A)	1,201 – 1350
Administrative Officer 1 (AO1)	1,051 – 1,200
Administrative Officer 2 (AO2)	901 – 1,050
Senior Executive Assistant (SEA)	751 – 900
Executive Assistant (EA)	444 - 750

## 9. Policy Revision History

Version	Date	Description	Author
2.0	17/08/2009	Policy Versioning Implemented	UCD HR
3.0	11/9/2013	The Job Grading Committee agreed the following changes to Section 2 – Scope of the Policy in June 2012:  Job Grading occurs – amended and updated this section Job Re-Grading occurs – Added this sub-heading in order to differentiate between the grading re-grading of posts	Job Grading Committee
4.0	3/9/2014	Change to Policy: <ul style="list-style-type: none"> <li>• Post Authorisation Form no longer required as part of job grading application</li> <li>• Updated to reflect that Job Grading occurs where, a temporary post of less than 1 year, that has never been graded, is extended</li> <li>• Updated to reflect new posts to be approved by the UMT</li> </ul>	Job Grading Committee
5.0	30/09/2019	<ul style="list-style-type: none"> <li>• The primary changes are to reflect the approval in July 2019 from the DES and DPER, allowing for incumbents to be promoted without competition when roles are re-sized, subject to certain criteria. Other language alignment and re-ordering of materials to make it more user-friendly.</li> <li>• One additional line relating to the formal records from the Job Sizing Committee meetings, based on legal advice.</li> <li>• A section relating to a long-defunct process under which regrading of individuals was permitted subject to their being certified as carrying out 60% of the regraded role has been removed.</li> <li>• Sentences relating to UMT approval of posts which was referring back to BRC process which has not been operated for quite a number of years now have also been removed.</li> </ul>	UMT and Job Sizing Committee