JOB EVALUATION QUESTIONNAIRE

The purpose of this questionnaire is to provide additional information for evaluators about your position for the purpose of updating your job description and for job sizing (job evaluation).

|  |  |  |
| --- | --- | --- |
| **Job Title:** | |  |
| **Jobholder/s:** | |  |
| **Supervisor/Manager’s Title:** | |  |
| **Supervisor/Manager’s Name:** | |  |
| **Department:** |  | |
| **Division:** |  | |

**TO BE SIGNED OFF UPON COMPLETION OF JOB EVALUATION QUESTIONNAIRE**

|  |  |  |  |
| --- | --- | --- | --- |
| **Completed by:** |  |  |  |
| Your Name Signature Date  We have discussed this questionnaire and acknowledge that it represents an agreed version of the job duties. | | | |
|  |  |  |  |
| Your Signature Immediate Manager Signature Date | | | |

**NOTES TO AID COMPLETION:**

**This questionnaire is to provide job evaluators with additional information about the job to help ensure quality decisions are made in the sizing of the job.**

 **Please read the whole questionnaire before starting.**

 **The questionnaire may be used to identify the Key Result Areas and potential performance measures for your job. It is NOT about how any particular jobholder performs in that job.**

 **If completing this in hard copy, you may add further pages as you need.**

**Both jobholders and their supervisor/manager are required to complete this questionnaire**. Managers need to complete all the tick-the-box items on the right-hand side of pages and add any additional comments to ensure the questionnaire provides a complete picture of the job’s requirements.

**Please attach the current Job Description (if any).**

**1. ORGANISATIONAL CONTEXT**

**(a) Prime Function/Purpose of Job**

State briefly, in one or two sentences, the principal function of the job and what it is expected to achieve.

The aim is to state the overall significance of the job from the organisation’s point of view - what is the contribution that this job makes to the organisation’s purpose

**(b) Key Responsibilities**

List the key duties performed and/or the key results or outcomes expected in terms of major objectives (List in order of importance). *If this is well covered in your job description then enter “See attached JD”.*

**(c) Authority – Staff and Financial**

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 1. Does the job administer a budget? **Yes/No** | |  | W hat is the size of the budget? (excl Capex) | | | | $ | | |  |  |
|  | |
| 2. W hat is the maximum you can sign off without your manager’s approval? | | | | $ | |  | | | |  |  |
|  | | | |  | | | | | | |  |
| 3. Do you have authority to spend from the budget of a higher authority, i.e. make the actual purchase from a budget held by someone else? **Yes/No** | | | |  | Max value per item? | | | $ |  | |  |
|  | | | | | | | | | | |  |
| 4. Can you buy in research or expertise on behalf of the company without someone else approving it? **Yes/No** | | | |  | Max value per item? | | | $ |  | |  |
|  | | | | | | | | | | |  |
| 5. Do you have the authority to purchase equipment, consumables, labour or other materials? **Yes/No** | | | |  | Max value per item? | | | $ |  | |  |
|  | | | | | | | | | | |  |
| 6. Are you able to give discounts to/waive fees for customers?  **Yes/No** | | | |  | Max value per item or %? | | | $ |  | |  |
|  | | | | | | | | | | | |
| 7. Are you able to hire, promote, discipline and fire staff in conjunction with your Manager, Supervisor or HR? **Yes/No** | | | |  |  | | | | | | |
|  | | | | | | | | | | |  |
| 8. Do you have the authority to enter into sales orders or contracts on behalf of the organisation and without referral to a manager/supervisor? **Yes/No** | | | |  | To what value? | | | $ |  | |  |
|  | | | | | | | | | | |  |
| 9. Other items which indicate the overall dimensions of the job e.g. able to sign  letters on behalf of the organisation: |  | | | | | | | |  | |  |
|  | | |
|  | | | | | | | | | | | |

**(d) Organisation Structure**

Please supply an organisational chart or complete the organisation chart below if you do not have an organisation chart. This shows where your job fits in the organisation structure. (Please use job titles not people’s names).

**YOUR MANAGER REPORTS TO**

**Title:**

|  |
| --- |
| Other jobs reporting directly to your manager |
|  |
|  |
|  |
|  |
|  |
|  |

**YOU REPORT TO**

**Title:**

**Start here**

YOUR POSITION

|  |  |
| --- | --- |
| Positions Reporting Directly to You | No of Staff This Position Supervises (FTEs) |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

FTEs

 **Total number of staff under your supervision/control**

* Does your job involve project manager/team leader responsibility? **Yes/No**

Give examples of 1 or 2 recent projects, and some details about the type, length, financial dimensions of project.

Approx how many

Approx how many days a year you train staff as part of your job?

* Are you required to oach, train or supervise contractors or volunteers? **Yes/No**

If so please indicate the nature of this responsibility, and whether this is a small or large proportion of the job.

**2. WORK COMPLEXITY**

**(a) Complexity**

W hat are the most complex (conceptually demanding) parts of the job? Give reasons why those examples are

so challenging or complex

**(b) Problem Solving**

**(b) Problem Solving**

Give examples of the most challenging problems you typically encounter which you have the responsibility to solve.

Give examples of issues you would escalate to your manager for a decision or for assistance.

**(c) Freedom to Act**

W here do you go for technical and non-technical assistance, or perhaps work related advice?

What guidelines, instructions, policies and procedures must you follow? W hat constraints are imposed on your job? You may rely on precedents or broad guidelines drawn from experience. Please give examples.

Does the job operate within a normal supervision environment or is there a need for the job to operate more autonomously than others? If so why?

**4. EDUCATION, KNOWLEDGE, EXPERIENCE**

**Formal Education & Training:**

Specify the level and kind of formal education, knowledge, training, and qualifications required to perform the job **competently**. Note: This should refer to the **minimum requirement** for a new, external appointment to the position, not necessarily the knowledge level and qualifications of the current incumbent. The level **required** for someone to perform the job competently? **Enter an “X” in the one box that best applies.**

**Job Holder***(view of role requirement)* **Manager**

Education to minimum school leaving age

NCEA level 1-2 pass

NCEA level 3 pass

**NOTE:**

*This is what the manager views as the minimum requirement*

**NOTE:**

*This is about what the job requires not what you may have!!*

Trade/occupation-related certificate pass

Please specify . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .

Under-graduate diploma and/or technical certificate

Please specify . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .

University Degree (Bachelor level )

Please specify . . . . . . . . . . . . . . . . . . . . . .

Post-graduate University Degree (Masters/PhD level)

Please specify . . . . . . . . . . . . . . . . . . . . . . .

**Years and type of Experience required:**

This is the minimum for entry into the position and refers to the relevant and necessary experience after gaining the necessary education or qualifications, for someone to perform your job **competently**. **Enter “X” in one box only.**

**Job Holder***(view of role requirement)* **Manager**

The level required to perform straightforward clerical or operational tasks. Minimal experience required as tasks can be learned on the job – **less than six months.**

**NOTE:**

*This is what the manager views as the necessary experience.*

The level required to perform routine work practices, able to be mastered quickly – **less than one year.**

Required to draw on skills and experience related to specific activities, equipment or work practices

– **1-2 years**

**NOTE:**

*This is about what the job requires not what you may have!!*

Needs to draw on relevant longer-term experience specific to the job and work demands, acquired

over time– **3-5 years.**

Needs to draw on experience of a broad nature, above that of a skilled operator, where the job impacts on wider areas and activities outside the job itself –– **6-9 years.**

Needs to draw on specialised normally gained through professional qualifications and significant post graduate experience –– **10-13 years.**

Needs to draw on extensive experience in varied environments, stretching over 15 years.

Extensive business and people management experience for managing a significant division of the organisation as CEO or direct report to the CEO.

**Technical Skills**

W hat practical or technical knowledge, skills or experience is **required** for someone to perform the job competently? (e.g. knowledge of particular legislation, ability to operate technical equipment e.g. PABX, ability to use desktop publishing software to produce print-ready copy, tax accounting, ability to build spreadsheet models

**5. ADDITIONAL INFORMATION RELEVANT TO THE POSITION**

List any further details which are significant and have not been covered elsewhere in this form or in the job profile, i.e. special projects undertaken, personal risk, unique working conditions etc that you feel are relevant in considering the overall “size” of this job.

**Please add further pages if required. Thank you for your participation.**

**For Completion by the Jobholder ’s Immediate Manager**

 Please review the questionnaire carefully and satisfy yourself that the responses represent an accurate picture of this job and of all its key features.

 **Do not alter the jobholder’s comments without his/her agreement.**

 Please make any comments on this page. If you disagree with any of the jobholder’s comments or examples, or

you wish to add to them, do so here. Attach extra pages if necessary.

 If there is any disagreement between you and the jobholder, please discuss it and attempt to arrive at an agreed version. In the event that you cannot reach agreement, the key issues should be identified below for resolution at the next level of management.

**Please complete page 1 of the questionnaire. Thank you for your co-operation.**