

enCompassing Visions Case Study

Town of Beaumont

Summary

The Town of Beaumont had a compensation system, but they found themselves looking for more clarity and consistency. They knew that their job evaluation and performance management systems needed to be more objective and measurable, and they also needed a Human Resources function to provide policies and direction.

Location: 3.5 km SE of Edmonton

Population: 11,747

- One of the Top 20 Fastest Growing Communities in Canada
- One of the three officially bilingual municipalities in Alberta

Challenges

- A job grading committee that was perceived as biased by staff. The committee included councillors and administration, making it difficult to schedule meeting times, and also providing little transparency.
- A broad, generic job classification template was being used that didn't provide differentiation between jobs.
- Jobs were not valued accurately or consistently, there was a limited questionnaire in the job evaluation tool, with less than optimal consideration for internal equity.
- The trait-based performance review process was done on paper, and because job evaluation was not being done well, there were no accurate standards against which to measure performance.

Solution

The solution for Beaumont's HR challenges was a multi-faceted approach. The first step was to enlist the consulting services of Transitional Solutions. Led by Kevin Robins, Transitional Solutions is a local management consulting firm, specializing in municipalities. Kevin and his team did a salary survey of other municipalities, providing Beaumont with external salary information. In the meantime, the Town conducted a search for an HR Director and hired Robert Koop.

One of Robert's first actions in his new role was to purchase *enCompassing Visions* software. Robert attended an *enCompassing Visions* training session in February 2008, and from there was able to implement the software and begin customizing it to fit Beaumont's culture. He formed a job evaluation committee that was composed of the HR Director, a manager, and five employees who were representative of the organization. This group is known as the grading sub-committee (the original grading committee is still active).

"I really appreciated facilitated job evaluation as it helped the committee focus on the position requirements not the person and by balancing our perceptions with a broader view." – Robert Koop

In March, Kevin Robins facilitated the job evaluation process for Beaumont using *enCompassing Visions*. The committee evaluated 52 jobs over 7 days, with their record being eight jobs evaluated in one day. Once that project was completed, the Chief Administrative Officer, Marc Landry, introduced the job evaluation results and the new salary grid to the organization through town hall meetings. An appeals process was put in place that allowed employees to appeal the evaluation of their job if they felt it was not

accurate. Following the initial introduction, only four appeals were found to be valid, and those jobs were reclassified as required.

Prior to introducing the performance review component of *enCompassing Visions*, Beaumont began looking at the 38 competencies in the software package, with the goal of condensing these so that the performance review would focus on the areas that are most important for them. This exercise reduced the number of competencies to 26, which still provided a comprehensive performance review, while keeping the review at a reasonable length.

In June 2009 all staff at Beaumont completed their first round of performance reviews in *enCompassing Visions*, evaluating their performance based on the competencies identified for each job by the job evaluation process. Robert Koop had introduced this process to the staff through information sessions, making them aware of how the reviews would be done, and how the software would calculate the results. He also trained supervisors, but did this in smaller groups of two to four people who worked in similar job areas. This training and awareness resulted in a high level of satisfaction among supervisors and staff throughout the process, and with the performance review results.

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Transitional Solutions provided training for the Mayor and Council on how to use the enCompassing Visions software to conduct an annual performance review of the CAO. The Mayor and Council will conduct a competency-based review in 2010 and a goals and objectives review in 2011.

Results

As a result of using enCompassing Visions for job evaluation, Beaumont was able to establish internal ratings for their jobs, which they combined with the salary survey to create an equitable, consistent compensation grid. Employees now have confidence in the process because they understand how the grid was established, and employee participation in the job evaluation process has provided more transparency. The grading sub-committee is active, and continues if required to meet twice a year. In January they examine new positions that have been introduced, and evaluate them to ensure internal equity. In June they do any internal adjustments that are needed, looking at jobs that may have changed significantly during the year.

“Once fully implemented, enCompassing Visions will provide a tool that will assist us in the effective management of our most important resources – people.” Gilles Prefontaine, Mgr, Finance & Administration

In terms of the performance management process, the training and support provided by Robert helped employees feel comfortable, despite the significant change from the past process. The staff understand how the reviews are done, and they like the fact that their performance is rated based on what their job requires. The software accommodates the level of feedback with which each supervisor is comfortable, whether they prefer to include a significant number of written comments, or a more minimal review.

For supervisors with a large number of direct reports, the process has significantly reduced their time commitment for reviews. One supervisor with 16 direct reports says that the process takes her about an hour per person (30 minutes to complete the review in enCompassing Visions, and 30 minutes for discussion with the employee). However, she feels this is much less time than she used to spend, and the quality of the review is much higher.

What's Next for Beaumont

The Town intends to continue expanding their use of enCompassing Visions in ways that will enable them to track information more effectively, as well as evaluate performance more accurately. Some of the areas they are considering include:

“enCompassing Visions has provided a basic structure for jobs and performance that Beaumont can continue to build on as the organization grows and develops.” – Marc Landry, CAO

- Using the annual work plan section of enCompassing Visions to track and evaluate employees' goals each year.
- Tracking employee training courses, either those they have completed or those they are required to complete.
- Conduct a competency and goals & objectives evaluation of the CAO

For more information, contact:

enCompassing Visions

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