JOB ARCHITECTURE: DESIGN WORKSHOP FACILITATION GUIDE

November 4 | 10:00 AM to 4:00 PM

SESSION PURPOSE

This session brings together colleagues to build the foundation of our future-state job architecture. **The day responds to the strongest theme from the October interviews: people want clear, visible paths to grow.** Starting from their own career journeys and our current levels, participants describe what each level looks like and what it takes to move from one level to the next. That input shapes the next iteration with HR leadership.

FRAMING TO HOLD THROUGHOUT

Framing to keep in mind

- Today builds the foundation of the framework, and we won't touch on every aspect of job architecture.
- our current levels are the starting point. The levels are open to refinement, but today's activities focus on how the levels work now, so we understand the current state before proposing any adjustments.
- Level criteria describe what is expected at each level. Readiness to move to the next level doesn't guarantee a promotion: moves also depend on open roles and our budget. Some roles won't have a next step within the same function, and moves can be lateral as well as up.
- Pay is outside today's conversation and pay bands are a separate framework from job architecture. The two are connected but not the same

Terms we use today

- **our current levels:** These are the levels the organization uses to group roles today, numbered from Level 1 to Level 12. They are the starting point for the new Job Architecture. The levels are open to refinement, and today's input focuses on how they work now.
- **Level:** Each level carries a number from 1 to 12. Example titles show the kinds of roles at each level today and are not a complete list. Your title may look different from the examples, and that is expected.
- **Level criteria:** Level criteria describe what is expected at each level and what it takes to move to the next one, using four dimensions: autonomy, scope, complexity, and impact. The criteria the room builds today are a working draft to continue.
- **Function:** We're using function to describe the three main groups within the organization: Program, Development, or Operations. You will sit with colleagues from your function during the criteria mapping rounds.
- **Job family:** A job family is a group of roles within a function that require similar skills and knowledge. For example, Major Gifts and Corporate and Foundations could be separate job families within Development.

AGENDA

Time	Block	Activity and Discussion Prompt	Materials	Lead
10:00–10:15	**Welcome and Why Now**	Executive Sponsor kicks off the day (5 min) with a few words on why this work matters and why participants' engagement is critical. Miriam then welcomes the group on behalf of the organization HR, thanks participants for the perspectives they shared in the October interviews, and shares why job architecture matters for the organization now. Consultant and Co-Facilitator introduce themselves. Co-Facilitator sets the norms and the co-creation frame. Consultant previews the flow of the day.	• Agenda on wall • Slides: the Executive Sponsor's opening, the consulting partner introductions, why now, agenda, and norms • Parking lot flip chart posted	Executive Sponsor kicks off Miriam presents why now Co-Facilitator sets norms and frames the day Consultant previews the flow

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10:15–10:35	**Data Review**	Consultant shares what best practices research shows, then reflects key themes from the October interviews **Prompt:** *What resonates most with you? What surprises you?* She then walks through the shared language for the day (our current levels, level, level criteria, function, and job family).	• Slides: Data review (best practices, interview themes, shared language)	Consultant
10:35–11:05	**Career Journey Map**	**On their own (15 min):** Participants map three to five stops in their career, at the organization or elsewhere, using the career journey map template. For each stop they write the title across the top and their role and key responsibilities underneath. Participants earlier in their careers add one "next" stop: where they think they are headed and what that role would involve. **In trios (10 min):** Each person shares one moment that felt like a real step up and why. **To close (5 min):** A few volunteers share what made a step up feel real, which leads directly into the review of our current levels. **Prompt:** *What changed when you took a real step up?*	• Career journey map template, one per participant	Co-Facilitator leads Consultant and Miriam support trios
11:05–11:30	**our Current Levels**	**Review our current levels (15 min):** the VP of HR walks through our current levels. Reminder: The titles are examples, not a complete list, so some people's titles will look different, and that is expected. Explain that these levels reflect how roles are grouped at the organization today and are the starting point for the level framework. The levels are open to refinement, but today's activities focus on how they work now, so we understand the current state before proposing any adjustments. Pay is outside today's conversation. Questions about where a specific role sits go to the parking lot for the VP of HR and the HR team. ***Facilitator note:*** *Some titles may not sit where people expect, such as executive assistants and coordinators. Capture these in the parking lot rather than resolving them in the room.* **Prompt:** *What questions do you have about our current levels?* **Q&A (5m)**: the VP of HR answers clarifying questions from the group **Level criteria best practices (5 min):** Consultant shares how strong organizations describe what each level involves and what it takes to move up, including what autonomy, scope, complexity, and impact mean in practice.	• Slides: our current levels • Levels reference at each table (Levels 1 to 12 and example titles) • Parking lot flip chart	the VP of HR leads the levels review and Q&A Consultant shares level criteria best practices
11:30–11:40	**Break**			

Time	Block	Activity and Discussion Prompt	Materials	Lead
11:40–12:40	**Criteria Mapping Round 1**	Participants move from their trios to their functional group tables. **Set up criteria mapping (5 min):** Co-Facilitator explains how the three mapping rounds work. Functional groups fill in level criteria for Levels 1 to 3 as they show up in their function. **On their own (5 min):** Participants capture what they think each level should involve on sticky notes and post them on the group's table. **As a group (35 min):** Groups fill in the level criteria table, one row per level. The three columns in the table: – Level (pre-filled, with example titles) – Role and responsibilities (autonomy, scope, complexity, and impact) – What needs to be true to move to the next level Groups note anything they cannot resolve in the parking lot box on the template. **Prompt:** *What does each level look like in your function, and what does it take to move to the next one?* **Gallery walk (5 min):** Groups visit the other functions' tables and leave sticky notes with reactions and questions. **Share-out (10 min):** Co-Facilitator asks two or three groups for one thing that stood out, and the room names what looks similar and different across functions for Levels 1 to 3. Groups can bring these ideas into Round 2 after lunch. **Prompt:** *What did another function capture that you want to borrow or question?*	• Level criteria table for Levels 1 to 3, one per group • Levels reference • Sticky notes • Flip chart for cross-function themes • Functional group assignments	Co-Facilitator sets up and runs the round, leads the gallery walk and share-out, and keeps time Consultant captures cross-function themes Consultant, Co-Facilitator, and Miriam support groups
12:40-1:20	**Lunch**			Co-Facilitator photographs Round 1 tables and gallery walk notes

Time	Block	Activity and Discussion Prompt	Materials	Lead
1:20-1:30	**Energizer**	**Purpose:** Get participants moving, reconnecting, and sharing a little about themselves before jumping back into the afternoon activities. **Instructions** 1. Stand up and find someone you haven't had a chance to connect with today. 2. We'll go through three quick rounds, each with a different conversation prompt. 3. You'll have about **one minute each** to share your response. 4. After each round, find a new partner and get ready for the next question. 5. Keep it light and have fun! **Round 1: Past Experiences** **What's a job you've had that people would never guess?** *For example: Your first teenage job, an unusual summer job, a side hustle, or something completely different from what you do today.* **Round 2: Unexpected Skills** **What's a skill or lesson from a previous job that you still use today?** *For example: Learning patience in customer service, multitasking while waiting tables, or public speaking from a college job.* **Round 3: What If?** **If you could try a completely different career, what would it be?** *For example: A childhood dream job, something creative you've always wanted to pursue, or a career you'd love to try for just one day.* **Wrap-Up** Thank everyone for participating and invite one or two volunteers to share something fun or surprising they learned about a colleague.		Co-Facilitator

Time	Block	Activity and Discussion Prompt	Materials	Lead
1:30–2:15	**Criteria Mapping Round 2**	Functional groups repeat the same steps for Levels 4 and 5, starting with how Level 4 builds on Level 3 from Round 1. Co-Facilitator reminds groups that some roles at these levels carry Manager titles, like Relationship Manager, but don't manage people. **On their own (5 min):** Sticky notes on what each level should involve. **As a group (25 min):** Groups fill in the level criteria table for Levels 4 and 5. **Growing as an expert (15 min):** Groups use the box on the template to describe what growth beyond Level 5 looks like for someone who wants to grow as an expert rather than as a people manager. **Prompt:** *What does each level look like in your function, and what does it take to move to the next one?* **Growing as an expert:** *What does growth beyond Level 5 look like for someone who wants to grow as an expert rather than a people manager?* ***Facilitator note:*** *Gather input without implying that the organization will create a formal individual contributor career path. That decision belongs to the organization leadership.*	• Level criteria table for Levels 4 and 5, one per group • Levels reference • Sticky notes	Co-Facilitator explains the round and keeps time Consultant, Co-Facilitator, and Miriam support groups
2:15–2:50	**Criteria Mapping Round 3**	Functional groups repeat the same steps for Levels 6 to 9, starting with how Level 6 builds on Level 5 from Round 2. **On their own (5 min):** Sticky notes on what each level should involve. **As a group (30 min):** Groups fill in the level criteria table for Levels 6 to 9 and use the box on the template to note which roles at these levels lead through expertise rather than through people. (Can list groupings of role, doesn't have to be by title) **Levels 10 to 12:** These levels will be discussed with HR leaders at a later date and are not part of today's criteria mapping. **Prompt:** *What changes in scope and impact as roles move from managing work to leading a program, region, or function?* **Leading through expertise:** *Which types of roles at Levels 6 to 9 lead through expertise rather than through people?*	• Level criteria table for Levels 6 to 9, one per group • Levels reference • Sticky notes	Co-Facilitator explains the round and keeps time Consultant, Co-Facilitator, and Miriam support groups
2:50–3:00	**Break**			Co-Facilitator photographs Round 2 and Round 3 tables

Time	Block	Activity and Discussion Prompt	Materials	Lead
3:00–3:30	**Criteria Mapping Debrief**	**Gallery walk (10 min):** Groups visit each other's tables, focusing on Rounds 2 and 3, and leave sticky notes with reactions and questions. **Share-out (10 min):** Co-Facilitator walks the room through each round in turn (Levels 1 to 3, Levels 4 and 5, and Levels 6 to 9). **Facilitator's note**: For each, groups name what was similar across functions and what was different, including what they heard about growing as an expert. **Prompt:** *What was your experience like filling out level criteria? Anything surprise you? Any "a-ha" moments?* **Job families (10 min):** Each participant answers one question on a sticky note and posts it on their function's job families flip chart. **Job families:** *Which roles in your function do similar work and require similar skills?*	• Completed level criteria tables on display • Sticky notes • Flip chart for cross-function themes • Job families flip chart for each function	Co-Facilitator leads the gallery walk and share-out Consultant captures cross-function themes Miriam supports groups
3:30–3:50	**Where We Agree / Emerging Themes and Questions**	Consultant and Co-Facilitator reflect common threads across the day, including what groups shared about growing as an expert. (gathered throughout the day and during job families section) Throughout debrief discussion, Consultant or Co-Facilitator write share-out themes in the appropriate section: Solid (broad agreement)/ Close (needs some refinement), and Open (needs more discussion). As a final exercise, participants place dots on the open questions they most want to address next. The result is the foundation the HR team can carry forward. **Prompt:** *What can we build on, and what still needs work?* **Final prompt:** *What themes or ideas are missing from what you see on the wall*	• Completed tables on display • Solid/Close, and Open wall charts • Dot stickers	Consultant and Co-Facilitator
3:50–4:00	**Appreciations & Closing**	Consultant recaps what the room built today and invites participants to share a closing appreciation, and Miriam closes by sharing how the HR team will carry the work forward with the VP of HR.	• Next steps slide • Closing appreciations slide •	Miriam discusses next steps Consultant leads the recap, appreciations, and final opportunity to share on your way out

OUR CURRENT LEVELS (REFERENCE FOR THE LEVELS REVIEW)

Participant materials show Levels 1 to 12 with an example title for each level and example roles for Levels 1 to 9, with a note that these are examples rather than a complete list and that someone's title may differ. Workshop activities will focus on Levels 1-9. The current code column is a reference for facilitators and HR so the room's input can be mapped back after the workshop. It does not appear on slides or templates.

Level	Example title	Example roles	Current code (facilitators only)
Level 1	Assistant	Administrative Assistant; Program Assistant	A

Level	Example title	Example roles	Current code (facilitators only)
Level 2	Coordinator	Program Coordinator; Human Resources Coordinator	B1
Level 3	Senior Coordinator or Senior Assistant	Executive Assistant; Senior Administrative Assistant	B2
Level 4	Manager	Relationship Manager; Data Analyst; Staff Accountant	C1
Level 5	Senior Manager	Senior Relationship Manager; Communications Manager; Senior Accountant	C2
Level 6	Director I	Area Development Director; Director, Student Services	D1
Level 7	Director II	Regional Development Director; National Director, Communications	D2
Level 8	Senior Director	Senior Director, Program Management	D3
Level 9	Assistant Vice President	Assistant Vice President, Corporate and Foundations	AVP
Level 10	Vice President		VP
Level 11	Senior Vice President		EXEC
Level 12	Executive Vice President		EXEC