

Job Evaluation Policy

About this policy

Purpose

This chapter describes the Job Evaluation policy and procedure. Refer to the table of contents, below, for a full list of topics covered.

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Version control

The table below shows the history of the document and the changes that were made at each version:

Version	Date	Summary of changes
1.0	October 2010	First published version.
2.0	January 2017	Updated to HLT Style.
3.0	March 2018	Alignment of timelines and process to the LBH policy

Distribution

This policy is available on Aspire and the HLT Services for Schools website.

1. Introduction

Job Evaluation is carried out on:

- All new posts.
- Posts arising from re-organisations.
- Existing posts where there have been significant and permanent changes to the duties or requirements of a job.
- Existing posts where no evaluation has taken place for 6 months and there may be reasonable belief that the job role has changed.

We will:

- Operate a fair job evaluation process that is applied consistently and without bias or discrimination.
- Reward our employees correctly for the jobs they do.

2. Operating Principles of the Process

We will:

- Use the Greater London Provincial Council (GLPC) Job Evaluation Scheme ([Aspire / schools](#)). This is a robust factor-based scheme that has been extensively tested to ensure that it is bias and discrimination free.
- Use evaluators trained in accordance with the GLPC training programme.
- Engage employees and Trade Unions at appropriate stages of the job evaluation process.
- Monitor all outcomes to ensure the fair and consistent application of the scheme across the Trust/schools.
- Monitor all outcomes in accordance with comparable roles with the London Borough of Hackney.
- Provide post-holders with the right of appeal.
- Manage the process in accordance with the time limits specified (these may be varied by agreement or in exceptional circumstances, such as a large re-organisation).

3. Scope of the policy

This Job Evaluation process will apply to all posts, except:

- Posts on Chief Officer conditions of service.
- Teaching posts and those on Soulbury Terms and Conditions*.

These are covered by separate processes.

*Applicable to Educational Psychologists

Any references to the Head of Human Resources, a Director or appellant in this process will also mean their nominated representatives.

4. Summary of roles and responsibilities

4.1. Employees

Employees are entitled to:

- Be involved in and consulted on changes to their job description.
- Suggest changes to their job description to their manager.
- Have the grade of their job determined by independent job evaluation.
- Raise any concerns informally with their manager following the outcome of the job evaluation.
- Appeal the grade of their job after an evaluation carried out while they are in post (if informal discussions do not resolve the employees concerns).

4.2. Managers/Headteachers

Managers/Headteachers will:

- Write job descriptions that accurately reflect the current duties of the post.
- Act promptly to implement new job descriptions when there has been a genuine change in job requirements.
- Involve and consult employees when revising existing job descriptions for evaluation.
- Consult Trades Unions where changes are made to generic posts or where changes will impact on a number of posts.
- Respond to written requests from an employee to amend a job description.
- Consider if any suggested changes are accurate, necessary and permanent, and if so, draw up a revised job description with and through consultation with the employee.
- Submit amended and new job descriptions for evaluation.
- Provide impartial and accurate information to evaluators and panels that relates only to the duties set out in the job description/person specification and not the performance of an employee in post.
- Assess the impact of and manage changes to grade within budget.

- Obtain approval from their Head of Department/governing body prior to implementing any re-grading of posts.
- Provide all supporting documentation including structure charts and additional information questionnaire

4.3. Human Resources

Human Resources will:

- Ensure that all staff (including Trade Unions) involved in evaluations are trained in the GLPC Evaluation scheme.
- Use a set of procedures to enable the consistent application of the evaluation process within Hackney Learning Trust.
- Monitor evaluations to ensure that all stages of the process are correctly followed and conventions applied and call in for review any evaluations that appear incorrect or misapplied; with consultation and through an agreed procedure.
- Keep appropriate records and maintain a database of job descriptions.

4.4. Trade Unions

Trade Unions are entitled to:

- Accompany their members to appeal meetings to provide support at the members' request.
- Be consulted where changes are made to generic posts or where changes will impact on a number of posts, which could include:
 - Additional or reduction in role responsibilities.
 - Revised line management or operational arrangements.
 - Introduction of new technology and systems of work.

5. Job Evaluation Process

The job evaluation process has five basic stages:

- Identifying the need for change.
- Consultation and Submission.
- Job Evaluation.
- Appeal.
- Implementation.

5.1. Identifying the Need for Change

5.1.1. Employee instigated

An employee may make a written request to their manager for an amendment to their job description, and a new job evaluation, where:

- There have been significant changes to the job.
- It is 6 months or more since the last evaluation of the post.
- It is 6 months or more since the employee was appointed to the post.

5.1.2. Manager instigated

A manager may initiate an amendment to a job description at any time, through consultation and negotiation with the employee.

A manager must submit job descriptions for new posts (i.e. a post that has significantly different requirements from any existing post) for evaluation.

Duties exceeding the requirements of the job and agreed for the purpose of the personal development of an employee will not give rise to an amended job description or a new job evaluation.

5.2. Consultation and Submission for Evaluation

Managers/Headteachers will:

- Consult with employees making a written request for a change to a job description, make any agreed amendments to the job description and submit it for evaluation (normally within 20 working days of receiving the employee's request. Both the manager and the employee will sign the agreed job description.
- Consult with employees requesting a re-evaluation of an existing job description (where there are no changes to the job description) and submit it for re-evaluation (normally within 5 working days of the employee's request). Both the manager and the employee will sign the agreed job description.
- Consult with Trades Unions where changes are proposed to generic posts or where changes will impact on a number of posts.
- Managers/Headteachers will submit the following documents:
 - Original job description for comparison (if applicable)
 - New/amended job description (on the up to date template).
 - Structure chart(s) showing where the post fits within the structure. Any other information relevant to the job evaluation
- Other optional documentation at this stage is:

- Job Evaluation - Additional Information Questionnaire ([Aspire](#) / [schools](#)) completed in consultation with the employee.
Any job descriptions of a similar nature.

Evaluation requests should be submitted to hr@learningtrust.co.uk

5.3. Job Evaluation procedure

A panel of two independent trained evaluators will carry out job evaluation (normally within 14 working days of receipt of the evaluation request). One evaluator will be nominated as Lead Evaluator. All panel members will be fully trained to carry out evaluations impartially and professionally. Panels will usually consist of two members of Human Resources trained to discharge job evaluations.

The Lead Evaluator will:

- Check the job description and submitted documentation for completeness and for any inconsistencies.
- Clarify any points with the post-holder and/or the manager, as necessary, to ensure that the job description and additional information provided is fully understood.

Log the completed evaluation on the Job Evaluation spreadsheet ensuring that the evaluation is consistent with evaluations for related roles. The panel members will:

- Separately and independently evaluate the job description in accordance with the Greater London Provincial Council (GLPC) Job Evaluation Scheme and the established conventions.
- Note the factor level awarded for each factor.
- Arrange a meeting with the post-holder and/or the manager to clarify points if considered necessary.
- Identify any areas of disagreement and aim to reach to consensus on the factor levels awarded and the grade.

If the panel members cannot agree on the appropriate level for any factor, it will be referred to a senior member of the Human Resources team for determination. The reasons for the factor levels awarded will be recorded together with the areas of disagreement.

The Lead Evaluator will inform the manager of the decision of the panel.

On a quarterly basis the Deputy Head of HR or nominated representative will review all the job evaluations for the previous quarter.

5.4. Appeals

If a post holder is not satisfied with the outcome of the job evaluation, wherever possible they should raise their concerns informally with their line manager before appealing the decision.

5.4.1. The right to appeal

Post holders have the right of appeal against the evaluation. Appeals must be submitted in writing using the Appeal Form ([Aspire / schools](#)) to the Head of Human Resources within 20 days of the post holder being notified of the outcome of the evaluation.

No appeal may be made against an evaluation of a new and unoccupied post, except as grounds for an appeal against dismissal due to redundancy arising from a restructure.

As part of individual consultation during a restructure and where an employee believes and can demonstrate that they have not had assimilation or ring-fenced opportunities due to an incorrect or misapplied job evaluation, the evaluation of the post(s) in question will be jointly reviewed by independent HR and trade union evaluators not previously involved in the process.

The grounds of appeal may not include references to personalities or performance/ability.

5.4.2. Organising the hearing

The Head of Human Resources (or nominated representative) will hold an appeal hearing (normally within 20 working days of receipt of the appeal papers). The information set out below will be made available to all parties to the appeal before the date of the hearing:

- Job Description.
- Additional Information Questionnaire.
- Organisational structure chart(s).
- Any other documentation/submissions that were considered during the evaluation.
- The completed appeal form.
- The appellant's case statement(s).
- The panel and line manager/Headteacher's responses.

The Head of Human Resources (or nominated representative) is responsible for the administration and coordination of the Job Evaluation Appeal Process.

5.4.3. The Appeals panel

The appeals panel will consist of:

- One representative of the Head of Human Resources (not previously involved in the job evaluation).
- One Senior Trades Union Branch Representative who have not previously been involved in the evaluation and who have no vested interests in the outcome (e.g. work in the service area where jobs are located).

The Head of Human Resources (or nominated representative) will chair the appeal.

The following will attend the appeal hearing:

- Chair:
 - To hear the appeal.
 - To steer the parties through the proceedings.
 - To ensure that everyone has the opportunity to present the arguments of their case.
 - To question and gather whatever information or clarification is necessary.
 - To ensure that the proceedings are cordially conducted.
- Panel Members:
 - To hear the appeal.
- Appellant (may be accompanied by Trade Union representative or colleague):
 - To present their case to the panel on the factors(s) challenged.
- Evaluator:
 - To explain and support the evaluation.
- Manager/Headteacher:
 - To clarify the duties and responsibilities of the post.
 - To make further comments on the evaluation or aspects thereof as permitted by the panel.

5.4.4. The hearing

The appeal hearing will operate as follows:

- The Chair will introduce those present and outline the process.
- The panel hears the appellant's case.
- The panel takes evidence from any one of the evaluation officers. Where a third officer had been required to settle any disagreement, then that officer will instead attend to explain his/her recommendations.
- The manager will attend and will invited to make his/her comments on the evaluation.
- Post-holders, evaluator and the manager/Headteacher may ask each other questions at the discretion of the Chair.
- The panel will then adjourn to reach a decision based on the application of the GLPC scheme and ensuring that the evaluation has not involved a misapplication of the scheme.

Both members of the panel must agree that the original evaluation was incorrect for the appeal to succeed.

The grade established will apply to all post-holders working to that job description (whether the post-holders have been directly involved in the appeal or not).

The Chair will confirm the outcome of the appeal (normally within 10 working days of the appeal hearing).

The decision of the panel is final and there is no further right of appeal.

5.5. Implementation

The effective date of the revised job description is the date on which an employee or manager submitted the request for re-evaluation.

- In the case of a major reorganisation/review, a single implementation date may be determined (e.g. by agreement with the Trade Unions; or to coincide with the happening of an event, such as funding becoming available, etc).
- An honorarium payment may be considered where the employee has (at the request of their manager) been undertaking higher grade duties prior to the implementation date.
- Where an evaluation raises the grade of an occupied post, the post-holder will be paid in accordance with the National Agreement provisions relating to promotion to a higher grade. It is not a promotion if you remain in the same post. It simply means that the post was under-graded before the evaluation and the correct grade is now being applied.
- Where the revised grade is lower, the employee's salary will be protected at the higher grade for a period of 6 months in accordance with the Organisational Change Policy ([Aspire /schools](#)).

6. Toolkit

The following documents and forms support this policy:

- Greater London Provincial Council (GLPC) Job Evaluation Scheme ([Aspire / schools](#)).
- Job Evaluation - Addition Information Questionnaire ([Aspire / schools](#)).