Introduction

This guide is designed to assist in the understanding of how job matching and job evaluation assessments are carried out. The two job families where jobs can be matched to a level, within them, are the Administrative, Professional and Managerial (APM) job family, or the Technical Services (TS) job family. A job family describes a number of roles which are engaged in the same or similar kind of work.

Job family modelling is a process of analysing work within a job family to identify levels of work based on accountabilities, performance measures, skills and competencies. A completed job family considers how many levels of that type of work there are, and describes key factors, which differentiate one level from the next.

Background

The University introduced a process of job matching as part of the development of the APM and TS job families. Jobs were grouped into the families and then matched into the levels. In order to maintain a robust job family framework, from June 2024 all new and redesigned roles will be assessed using the Korn Ferry (Hay) methodology.

Ongoing

The job matching process will continue to be used on re-grading panels (https://www.nottingham.ac.uk/hr/guidesandsupport/promotionandregrading/regrading/index.aspx).

Job evaluation assessments will take place for new roles and roles that are being redesigned to assess and match them to an existing benchmark role level.

Where changes to roles are minor, these can be reviewed by the HR Business Partner. A minor change is one that does not fundamentally change the purpose of the role, the level of technical knowledge, experience or the level of accountability a role is required to have.

Changes to an existing evaluated role must be provided to the HR Business Partner in tracked changes.

1) Job evaluation assessment process

An approved manager (usually budget holder) can request a job evaluation assessment of a new, revised role by completing the Job Level Assessment request form.

Before submitting a job evaluation assessment request, you must have the following documents ready:

- **Job profile** (if the request is for a post that has significantly changed, please put all changes in tracked changes)

- **Structure chart** (this should show all relevant reports above and below so that context and breadth of the role are clear, for management roles this should ideally include FTE numbers of staff in each area they manage)

- **Additional information form** (AIF) - (this form will enable evaluators to understand the context a role is operating in - https://www.nottingham.ac.uk/hr/guidesandsupport/jobfamilies/documents/job-level-assessment-additional-information-form.docx)

A job evaluation assessment panel is used to assign a job family level to new APM, O&F or TS roles. The panel will undertake an assessment based on the role information submitted by the manager. Where the assessment panel reach a consensus a benchmark role level will be agreed.

See the library of benchmark role profiles at: https://uniofnottm.sharepoint.com/sites/HRrecruit/Recruitment%20Document%20Library/Forms/AllItems.aspx.

1.1 Job evaluation assessment panel membership

It is important that the University has robust and consistent job evaluations assessments processes in order to maintain a fair pay and grading framework. Managers will be required to provide a level of detail through the job evaluation assessment request process that will enable trained evaluators to fairly and consistently level a role.

- HR Business Partner for that school/department
- Pay and Reward Team member
- A departmental representative can attend any panel at their or the panel request to provide further contextual information about the role, but will not be present for the assessment itself

All assessors must be Korn Ferry (Hay) trained evaluators. Where the job evaluation panel are not able to reach a consensus and agree an appropriate benchmark role profile, a formal **virtual panel** will be held.

1.2 Virtual panel membership

- Virtual panel chair *(must be an experienced Korn Ferry Hay trained evaluator from within HR)*
- HR Business Partner for that school/department (HRBP/Assistant HRBP)
- School/department representative (to provide contextual information about the role)
- Pay and Reward Team member (must be Korn Ferry (Hay) trained
- Union representative(s)

2) Re-grading panels - job matching process

The re-grading procedure should be used where a role that has a current incumbent has substantially changed eg when a role has increased in size, responsibility, complexity or in some other significant way.

2.1 Role profile forms

Role profile forms are completed by individual job holders and their line manager (http://www.nottingham.ac.uk/hr/guidesandsupport/promotionandregrading/regrading/index.aspx).

Full support from the school/department is required.

For each individual job, key activities and skills required are assessed and compared to the job family descriptors to determine best fit. The assessment takes place during a job matching panel. The panel can obtain additional information from manager/representative if required and probe for evidence. Need to ensure understanding of the job families and descriptors: https://www.nottingham.ac.uk/hr/guidesandsupport/jobfamilies/jobfamilies/index.aspx.

2.2 Re-grade job matching panel

- Chair – senior university manager
- HR Business Partner (HRBP)
- School/department representative
- Representative from another school/department
- Union representative(s)

2.3 Re-grade job matching protocol

Before the job matching panel:

- Ensure familiarity with the job family
- Read through the role profile forms to get a general understanding of the role(s) being matched
- Any panel member that has a potential *conflict of interest* with the role/post holder being re-graded must declare this with the chair in advance. The chair must then make a decision regarding whether the representative(s) should be independent from the school/department from the role being considered.

* A conflict of interest is:

- *where you have a personal relationship/friendship with the applicant*
- *where the applicant is a colleague within your area of operation where they may directly impact the work you do*
- *where the applicant is a colleague within your area of operation where you closely work with them on any aspects of your role*
- *where the assessor feels that they may not objectively be able to make a decision regarding the applicant's grade assessment*

2.4 At the re-grade job matching panel

- The chair will introduce panel members and ensure everyone is clear about what they have to do
- Opportunity to challenge, question and probe for further evidence, remember the objective is to establish the best general fit. You may find the role you are attempting to match fits part of one job family level descriptor and parts of another. In this case, you must use your judgement to determine best fit
- The panel members will then give their view on the best fit to the job family justifying their comments with evidence from the role profile form

2.5 The decision making

- Once all the views and opinions of the panel members have been explored based on the evidence, the panel must come to a consensus decision, if a consensus decision cannot be reached, the role will be referred for Korn Ferry (Hay) evaluation
- Decisions are made objectively and the supporting evidence provided is robust and defensible
- HR will record the decision for the panel providing full notes to justify the decision

To summarise:

- Clear and accurate role profile forms are fundamental to the process
- If you do not have a good understanding of the job you assess or match it
- Need a consensus view
- Comparative process
- Matching/assessing the job and the role requirements, not the person
- Assuming post holder is fully competent

Where can I find out more?

- Contact the HR Pay and Reward team: payandreward@nottingham.ac.uk.

Job family re-grading procedure

- https://www.nottingham.ac.uk/hr/guidesandsupport/promotionandregrading/regrading/index.aspx