



1. Introduction

This guidance outlines when and how to request a job evaluation assessment for all **new** and **substantially changed** roles including **re-grading** requests for existing postholders.

The scope of this guidance includes all Level 1 to 6, Administrative, Professional and Managerial (APM) Technical Services (TS) and Operations and Facilities (O&F) roles.

Employees who feel that the level of their work has significantly changed, should discuss this with their line manager in the first instance to review the role requirements and to seek consideration of a re-grading request. Employees, line managers and trade union representatives can seek support and guidance from the [HR Business Partner](#) for their faculty/school/department.

Job evaluation assessment panels will apply the Korn Ferry (Hay) job evaluation methodology to the assessment process supported by specially trained evaluators from the Pay and Reward team.

This guidance outlines:

- How to determine the level of assessment required
- How to submit a job evaluation assessment request

2. Determining the level of assessment

- **Minor amendments to roles and responsibilities and additional roles (for new appointments where a role already exists):** minor changes to an existing job profile reviewed at the point of recruitment, such as minor amendments to duties, terminology or activities and additional roles should be locally assessed by your [HR Business Partner](#), as outlined in the local assessment process in the job evaluation and re-grade request process flow at Appendix 1. If the HR Business Partner feels that changes may impact the roles grade, a full evaluation will be required.
- **New and redesigned roles:** all new and redesigned roles (where changes to roles are not deemed to be minor) being developed must have a job evaluation assessment using the Korn Ferry (Hay) methodology to support a grade decision. Refer to the internal assessment process in the job evaluation and re-grade request process flow at Appendix 1.
- **Re-grading request and organisational change:** regrading requests and changes to job profiles that has a direct impact on current post incumbent/s must have a job evaluation assessment using the Korn Ferry (Hay) methodology to support a grade decision. Refer to the joint trade union panel process in the job evaluation and re-grade request process flow at Appendix 1.

3. How to submit a job evaluation assessment request

When creating a new role, additional roles and redesigned roles, it is important to consider organisation design principles. For advice in role design and in completing the documents required for assessment, please discuss the role with your [HR Business Partner](#).

Prior to submitting a job evaluation assessment request, you should have the approval from the budget holder to implement a structural change.

A job evaluation assessment request should be submitted 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. A template of benchmark job profiles is available [here](#). In order to assist evaluators, please **do not use any acronyms** in the job profile.
- **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 full-time equivalent numbers of staff in each area they manage and budget size (where applicable).
- **Additional information form (AIF)** - This form will enable evaluators to understand the context a role is operating in. Click the link [here](#) to download the additional information form, also available [here](#) within the HR forms index. In order to assist evaluators, please **do not use any acronyms** in the additional information form.

4. Job evaluation assessment panels

It is important that the University has robust and consistent job evaluation assessment processes in order to maintain a fair pay and grading framework. Officers submitting a request 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 evaluate a role.

i) Internal job evaluation assessment panel membership

Internal job evaluation assessment panels are held as and when required to provide job evaluation assessment using the Korn Ferry (Hay) methodology.

- HR Business Partner for the school/department
- Pay and Reward Team member
- Departmental representative/s 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. A panel outcome cannot be confirmed unless there is a consensus and agreement of the evaluation.

Where the job evaluation assessment panel are not able to reach a consensus and agree an appropriate benchmark role profile, a **joint trade union assessment panel** will be held to determine the outcome.

ii) Joint trade union assessment panel membership

A joint trade union assessment panel supports the assessment and evaluation of re-grading requests and changes to job profiles as a result of organisational change that have direct impact on current post incumbents and referral from internal job evaluation assessment panels where a consensus cannot be reached.

- Chair of the panel*
- HR Business Partner
- Pay and Reward Team member
- Trade union representative/s**
- Departmental representative/s 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

In order to be quorate, a joint trade union assessment panel must have at least three trained evaluators present, inclusive of the Chair. Trade unions will be able to have up to two trained evaluators present at panels. Where a panel is not quorate, an evaluation will be deferred to the next available evaluation panel.

Managers submitting a job evaluation re-grade request will need to make themselves available to attend the next scheduled panel meeting (approximately 2 weeks following the date of submission). Please see the regrading panel schedule [here](#). Your panel slot will be confirmed a minimum of one week prior to the panel date.

* The Chair of the panel must be an experienced Korn Ferry trained evaluator from within HR.

** If in the event that no trade union members are available to attend panel, the panel may proceed in their absence.

a) Before the job evaluation panel

Prior to the joint trade union assessment panel, all panel members are required to:

- Consider if there is a potential conflict with any roles submitted for evaluation. 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
- If a panel member feels there is a conflict of interest, the panel member must notify the [Pay & Reward Team](#) in advance to seek further advice. The Associate Director of Pay and Reward or the Reward Manager will determine if there is a conflict of interest. Where a conflict of interest is confirmed, the Pay and Reward Team will co-ordinate a suitable alternative representative to substitute on their behalf.
- Review in advance all papers provided for the assessment of roles to ensure efficiency of the panel
- Consider the assessment and any points of clarification required to raise at panel
- Ensure that they are familiar with the job family requirements pertinent to the role

b) The joint trade union panel process

The Chair of the panel will introduce the roles that are to be reviewed in accordance with the schedule provided by the Pay and Reward Team/Employment Shared Services Team.

The Chair will introduce the departmental representative attending the panel and ask them to provide a brief outline of the role and its requirements. They will then be asked to respond to any questions or points of clarification from the panel members.

Prior to the scoring, departmental representatives will be asked to leave the meeting and will be advised that the outcome will be confirmed by the HR Business Partner (HRBP) once a decision has been made.

Panel members will present their scores and debate the assessment against the Korn Ferry (Hay) methodology. Panel members are required to professionally debate the scoring, allowing each panel member to provide their views. The Chair of the panel will have the casting vote if there is not a consensus of the other panel members.

c) Job evaluation outcomes and decisions

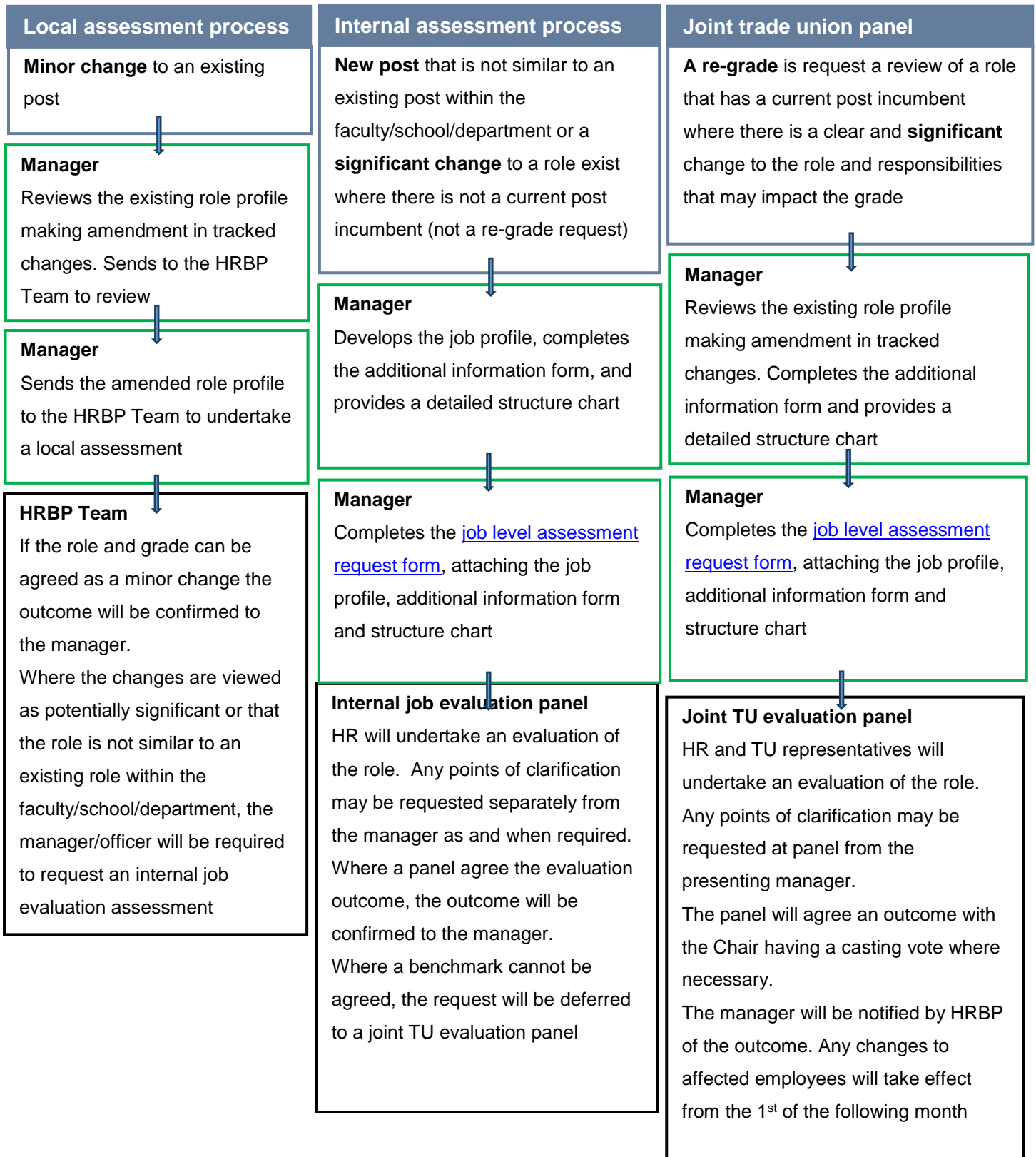
Following the outcome of internal and joint trade union assessment panels, the requesting officer will be advised of the panel outcome and grade level.

There is no right of appeal on the outcome of an internal or joint trade union evaluation panel. A request to re-submit any role including a re-grading request will only be considered if there is a clear, substantial change to the role since the previous evaluation. You should contact your [HR Business Partner](#) for further advice prior to submitting a role for re-evaluation.

Job evaluation rationales and panel scores are confidential documents that may only be made available to panel members and trained evaluators to support the relativity checks and balances of evaluations.

Documents that are provided to panel may be accessible upon reasonable request eg where the role specifically related to the individual or a direct report of the individual making the request.

Appendix 1 - Job evaluation and Re-grade request process flow



Appendix 2 – Glossary of Definitions

New role	A newly created role that is not similar in design, scope or level to an existing post within the existing structure
Redesigned role	A role that is being developed to reflect the change to business requirements, that is either an evolution or amalgamation of roles that already exists within the faculty/school/department
Re-grade	A request to evaluate an identified role that has or is required to be amended to reflect changing business requirements; these changes must be clear and substantial
Local assessment	A review to ensure that minor changes to a role do not fundamentally impact the evaluation and job level
Significant change	When a role has increased/decreased in size, responsibility, complexity or in some other way that may significantly change the level of knowledge, experience required to deliver the key responsibilities of the role, or where the breadth/scale/complexity of planning has changed
Minor change to role	A minor change to a role may be a change to job title, changes to the duties and responsibilities that does not have a significant impact on the level of knowledge, experience required to deliver the key responsibilities of the role
Korn Ferry evaluation	The University applies the Korn Ferry (Hay) methodology to the evaluation and assessment of all APM, TS and O&F role within the University
Internal job assessment panel	A meeting of specially trained Korn Ferry (Hay) job evaluation experts from within HR, to assess and evaluate roles within the University
Joint trade union assessment panel	A meeting of specially trained Korn Ferry (Hay) job evaluation experts from with HR and the joint trade unions, to assess and evaluate roles within the University
Job family	A job family describes a number of roles which are engaged in the same or similar kind of work; a job family considers how many levels of that type of work there are, and describes key factors, which differentiate one level from the next