**Job Evaluation**

Contents

[2](#_Toc75252047)

[1. Aims and purpose 4](#_Toc75252048)

[2. Definitions 4](#_Toc75252049)

[3. Key principles 5](#_Toc75252050)

[4. Criteria 5](#_Toc75252051)

[5. Documentation 6](#_Toc75252052)

[6. Evaluation 7](#_Toc75252053)

[6.2. New Roles 8](#_Toc75252054)

[6.3. Job Evaluation Team 8](#_Toc75252055)

[7. Appeals 8](#_Toc75252056)

[8. Approval 8](#_Toc75252057)

[9. Effective Date 8](#_Toc75252059)

[10. Supporting Documentation 9](#_Toc75252060)

[Appendix A: Request for re-evaluation of role proforma 10](#_Toc75252061)

**Document Details**

|  |  |
| --- | --- |
| **Author** | **REDACTED** |
| **Division Name** | **HR** |
| **Document Name** | **Job Evaluation Policy** |

**Change Record**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Version Number** | **Version Date** | **Next Review Date** | **Reviewer Name** | **Description of Changes** |
|  |  |  |  |  |

**Sign-off**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Position** | **Signature** | **Date** |
| **REDACTED** | Dir of Finance and Business Services | **REDACTED** | 02/08/2021 |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Aims and purpose

Crown Estate Scotland implemented its unified grading and pay structures with effect from 1st April 2019 based on the results of the application of the CES Job Evaluation Scheme (a copy of which can be found on the CES intranet). Crown Estate Scotland has now completed the transition to using the CES Job Evaluation Scheme as consulted through PCS.

The Crown Estate Scotland Job Evaluation Appeals Procedure was used to consider appeals arising from the initial application of the CES Job Evaluation Scheme.

Role holders will be able to request a ‘business as usual’ re-evaluation of their job in the event of a significant change in job content or responsibility.

This policy explains:

* Crown Estate Scotland’s approach to ensuring consistency in the re-evaluation of jobs beyond the initial application of the CES Job Evaluation Scheme;
* The grounds on which you can request a re-evaluation of your role;
* The documentation required for a role to be re-evaluated or a newly created role to be evaluated;
* The approval required for a role to be re-evaluated or a newly created role to be evaluated;

## Definitions

* 1. The Role of Job Evaluation

Job evaluation determines the relative size/scope/demand of jobs within an organisation and provides a rational basis for the design and maintenance of an equitable and defensible grading structure. Job evaluation assesses the demands of a job. JEGS is used to determine the relativities between one role and another.

Job evaluation is also not concerned with how busy a post is or workload, working pattern or the performance of the current role holder. The evaluation should focus on the nature of the tasks which need to be performed in the role and the type of responsibilities which the role requires to be undertaken.

* 1. What is JEGS?

JEGS is a computer-based analytical, job evaluation methodology developed and designed for the Civil Service by Towers Watson which holds the copyright. Together with Civil Service Employee Policy, they maintain a keen interest in its integrity and propriety.

It is used as a tool for designing and maintaining grading/pay banding structures and provides a flexible, systematic and consistent means of evaluating roles. It has been tested to ensure all steps have been taken to safeguard against any inherent discrimination.

Core JEGS can, if required, be tailored by an organisation to reflect any organisation-specific business values. Crown Estate Scotland has chosen to tailor it’s JEGS framework.

The CES JEGS system assesses roles against nine common factors which capture the main aspects of any role:

1. Knowledge and Skills
2. Contacts and Communications
3. Problem Solving
4. Decision Making
5. Autonomy
6. Management of Resources
7. Impact
8. Physical Effort and Dexterity
9. Working Conditions

Please refer to the CES JE Framework for more information on these factors.

## Key principles

In order to maintain the integrity of the grading structure the re-evaluation of changed jobs, and any subsequent revision in grading will be determined using the CES Job Evaluation Scheme as applied by the CES Job Analyst Team.

The definitions and guidance of all 9 factors of the CES JE Scheme will be applied to every job in accordance with the ground rules established by the CES Job Analyst Team prior to implementation of the initial evaluation outcomes.

The Senior HR Manager will ensure consistency by:

* Undertaking quality assurance of evaluations carried out by other members of the JE team to ensure correlation between the information provided and the assessment of the role.
* Comparing provisional evaluation outcomes to the results of the evaluation of the subordinate, equivalent, and superior jobs within the relevant job families (usually the immediate team/function) to ensure appropriate relativities in factor level scores.

## Criteria

The following criteria require to be met before an application for re-evaluation of an **existing job** can progress:

* At least a year has passed since the effective date of implementation of the original job evaluation outcome, its initial appeal, or a subsequent re-evaluation;
* The change in role profile is substantial and does not just reflect an increased volume of work, i.e. it cannot be addressed by employing more people;
* The change is a necessary part of the role;
* The change arises directly from a change in service requirements, or a requirement to reallocate existing responsibilities within the organisation.
* The change is permanent;
* The change is significant in terms of one or more of the 9 factors of the job evaluation scheme;
* Clear evidence of the change can be provided in support of the application for re-evaluation, including the impact of new duties on existing duties, i.e. what is no longer being done or done to a lesser degree/frequency;
* The line manager agrees that the change in job meets all of the above criteria.

If the line manager agrees that the criteria are met in full, they should seek approval from the appropriate Executive Team member who will authorise the review of the job. Where there have been business-led changes to a role the line manager may request that a role be re-evaluated before a year has passed, providing the remaining criteria have been met.

If the line manager does not agree that the change in the job fully meets all of the criteria, the jobholder may ask for the matter to be referred to the relevant Executive Team Member for a determination. In the event that the Executive Team Member determines that the request for re-evaluation does not meet all of the criteria the jobholder may appeal to the CES JE Appeal Panel if they can show that the Executive Team Member did not give due regard to the criteria outlined in section 4; and the JE Appeal Panel will determine if the change in the job fully meets the criteria for re-evaluation.

All **newly created jobs** will be evaluated in accordance with CES application of JEGS.

## Documentation

* 1. Existing Roles

Individuals who consider that changes in their job content and responsibility fully meet the criteria specified above should complete the ‘Request for re-evaluation proforma’ – see Appendix A – which will be available from the HR Team and on the intranet.

The completed proforma should then be passed to the line manager for comment. The line manager should then complete the relevant part of the proforma for submission to the Senior HR Manager – with appropriate accompanying documentation.

The jobholder and their line manager should complete the proforma in accordance with the advice provided in the ‘Request for re-evaluation proforma’ – see Appendix A – and with reference to the original Assessment Overview document – a copy of which can be provided by HR.

* 1. Newly Created Roles

The role profile required to provide the factual basis of the evaluation process shall be prepared within the employing team by the appropriate line manager and Executive Team member, in consultation with the HR Team, and shall include:

1. Job Purpose
2. Main Tasks
3. Key Responsibilities
4. Knowledge, Skills and Experience
5. Contacts & Communications
6. Problem Solving
7. Decision Making
8. Autonomy
9. Management of Resources
10. Impact
11. Physical Demands
12. Working Environment
13. Any Other Duties OR Pertinent Information
14. Person Specification

In line with our collective bargaining agreement, PCS are informed of newly created roles within the organisation.

Prior to seeking approval for a new role, a role profile should be completed. This should be written using the factor guidance within the ‘CES Application of JEGS’, which is available from the HR Team and on the CES intranet.

When an existing post falls vacant, the existing role profile shall be reviewed in line with the agreed format. If the criteria in section 4 are met following this review, a re-evaluation will be undertaken prior to the role being advertised.

This process does not impact the need for a Recruitment Authorisation Form, which can be found on the intranet. Completed RAFs (Recruitment Authorisation Form) give the final approval for recruitment.

## Evaluation

* 1. Existing Roles

The information provided in the Request for Re-evaluation proforma and any subsequent clarification or further information provided, will be assessed by the Job Analyst Team under the relevant factor heading(s) in comparison with the original evaluation, or previous re-evaluation, to determine:

* If the level of demand has increased or decreased as a result of the changes described in the content and responsibility of the job
* If the degree of change in either the nature, degree, frequency or duration of demand is sufficient to justify a higher or lower factor level score
* If the change in demand meets all the elements of the relevant factor level definition and associated guidance as applied by Crown Estate Scotland
* If the potential revision in factor level score is consistent with the application of that factor across roles in Crown Estate Scotland

If necessary, the Job Analyst will contact the jobholder and their line manager for clarification or further information required. This must be provided on the ‘Request for re-evaluation of role proforma’ – See Appendix A, and agreed by both the jobholder and their line manager.

If there is a change in assessment, a summary of this will be produced. An audit trail of the evaluation process will be retained by HR.

If there is a resultant change in the grading of the job, the documentation shall be referred to the appropriate Executive Team member to inform prior to communication to the job holder and line manager.

* 1. New Roles

The role profile agreed by line manager and Executive Team member will be referred to the Senior HR Manager for provisional evaluation. The evaluation will be undertaken and a documented audit trail of the evaluation process retained for record purposes.

When the Senior HR Manager is satisfied with the assessment it shall be referred to the relevant line manager and Senior HR Manager for agreement as to its factual accuracy. The agreed assessment, and its provisional grading, shall then be communicated to the Executive Team member (who may discuss it further with the line manager) prior finalising the grading and progressing through the usual recruitment process.

HR shall ensure that the appropriate grade and starting salary is cited on the RAF.

* 1. Job Evaluation Team

All roles role will be evaluated by two trained job analysts. These analysts will carry out independent assessments and then agree a joint outcome.

The Senior HR Manager will keep the recognised Trade Union representative informed of JEGS re-evaluation cases.

## Appeals

Re-evaluations carried out at the instigation of the role holder will have the right of appeal following the outcome.

Re-evaluations instigated by management or the evaluation of new roles will not be eligible for an appeal by a role holder unless the outcome of this results in a downgrading of the role.

Appeals will be managed in line with the CES Job Evaluation Appeals Procedure which can be found on the intranet.

## Approval

## If the process identifies that a change of grade is warranted to an existing role and in line with policy the Senior HR Manager will secure final approval from the Executive Team and then notify the recognised Trade Union and role holder.

## Effective Date

The effective date of the revised grade will be the date of receipt of the submission of the completed ‘Request for re-evaluation proforma’ by the HR Team in support of the request for re-evaluation.

## Supporting Documentation

Request for re-evaluation of role proforma

CES Application of JEGS

## 

## Appendix A: Request for re-evaluation of role proforma



**PART 1 – JOB HOLDER’S DETAILS**

|  |  |  |
| --- | --- | --- |
|  | **CONTACT INFORMATION** | |
|  | **JOB HOLDER** | **LINE MANAGER** |
| **NAME:** |  |  |
| **JOB TITLE:** |  |  |
| **WORK LOCATION:** |  |  |

Individuals wishing to request a re-evaluation of their role must firstly consider the criteria for re-evaluation as laid down in the CES Job Evaluation Policy. If they are of the opinion that a re-evaluation is merited, then they must use this form to make their written submission.

The job holder should detail, in the relevant sections below, the changes that have occurred in relation to their role which they consider meet the criteria for a re-evaluation. It may be helpful to detail the activities as they were captured in the original evaluation and highlight the additions, changes or deletions from the role. Information relating to the original evaluation can be obtained from the HR Team.

The form should then be submitted to the line manager.

If the line manager agrees that the requests meets the criteria laid down in the CES Job Evaluation Policy the line manager should then add their comments below.

**Note:** If there are no changes to specific areas then that section should be left blank.

If the manager does not feel that the criteria have been met, then they must discuss their reasons for rejecting the re-evaluation request with the job holder.

Advice can be sought from the HR Team by either the job holder or line manager to assist with the process.

If a re-evaluation is actioned, then a new role profile will be produced based on the existing role profile and the changes detailed below. If the re-evaluation results in a change of grade, then the procedure for re-grading (as detailed in sections 7 and 8 of the CE Job Evaluation Policy) will be implemented.

**PART 2 – DETAILS OF CHANGES TO JOB ACTIVITY/RESPONSIBILITY**

**1. Job Purpose**

This section should contain a summary of the reason the role exists within CES structure i.e. what it is there to achieve for the business.

|  |
| --- |
| **Job Holder Comments** |
| **Line Manager Comments** |

**2. Key Responsibilities**

This section should list the key responsibilities of the post holder. These will be directly related to the overall Job Purpose as summarised at section 1. If possible, please list in order of importance.

|  |
| --- |
| **Job Holder Comments** |
| **Line Manager Comments** |

**3. Main Tasks**

Please detail here the main tasks the job holder needs to undertake in order to achieve the key responsibilities and main purpose of the role. Please indicate the percentage of time the job holder will spend carrying out these tasks. If some tasks are cyclical or sporadic please indicate frequency.

|  |
| --- |
| **Job Holder Comments** |
| **Line Manager Comments** |

**4. Knowledge, Skills and Experience**

This section requires a description of the applied skills and knowledge associated with the role, i.e. the specific use and context of the knowledge and skills applied by job holder to operate effectively, e.g. understanding of technical specialism, relationship maintenance, project management, negotiation etc.

Please also detail any changes to formal qualifications and length of experience if recruiting directly to this post.

|  |
| --- |
| **Job Holder Comments** |
| **Line Manager Comments** |

**5. Contacts & Communications**

**Internal contacts**

Please detail with whom the job holder will be required to communicate in the course of their work. Exclude communication with others in the job holder’s own team. Please identify who (job title) the job holder is communicating with and the nature and purpose of the communication.

|  |
| --- |
| **Job Holder Comments** |
| **Line Manager Comments** |

**External Contacts with other Government bodies and similar**

Please detail with whom the job holder will be required to communicate in the course of their work. Please identify who (job title) the job holder is communicating with, the organisation (name of department or council area etc) and the nature and purpose of the communication.

|  |
| --- |
| **Job Holder Comments** |
| **Line Manager Comments** |

**External Contacts with other, non- public sector, organisations.**

Please detail with whom the job holder will be required to communicate in the course of their work. Please identify who (job title) the job holder is communicating with, the organisation and the nature and purpose of the communication.

|  |
| --- |
| **Job Holder Comments** |
| **Line Manager Comments** |

**6.** **Problem Solving**

Please describe the types of problems the job holder will typically be required to address, the frequency of those problems and any associated analytical or fact- finding activities required. Please also indicate if any of the problem-solving activities require the job holder to deliver creative, or new, solutions or outcomes.

|  |
| --- |
| **Job Holder Comments** |
| **Line Manager Comments** |

**7. Decision Making**

Please describe the types of decisions the job holder makes, if they have final authority to approve those decisions and the effect those decisions may have i.e. on people, processes, other parts of the business etc.

If the job holder is providing information or advice to others please say who is being informed or advised, about what and what use the recipient makes of that advice.

|  |
| --- |
| **Job Holder Comments** |
| **Line Manager Comments** |

**8.** **Autonomy**

Please describe the job holder’s personal responsibility for taking action e.g. is their role clearly defined, is there policy, precedent or guidance available, are they closely supervised. How often is their work reviewed by their supervisor.

|  |
| --- |
| **Job Holder Comments** |
| **Line Manager Comments** |

**9. Management of Resources:**

**Finance and Equipment**

Please detail the job holder’s responsibility for money and equipment. Describe any budgetary responsibility and the nature of any resources that they are responsible for. Are they able to redeploy or reallocate resources? If so please give details.

|  |
| --- |
| **Job Holder Comments** |
| **Line Manager Comments** |

**Leadership and Teamworking**

Please describe the job holder’s leadership or teamworking responsibilities. This includes roles where there is no formal requirement to manage others but the job holder is required to provide direction, encourage others or motivate and be a positive role model.

|  |
| --- |
| **Job Holder Comments** |
| **Line Manager Comments** |

**Management**

Please describe the job holder’s formal management responsibility. Include the number of direct reports and sections managed and the responsibility the job holder has for implementation of HR policy and/or practice.

|  |
| --- |
| **Job Holder Comments** |
| **Line Manager Comments** |

**10. Impact**

Please describe the impact of the activities undertaken by the job holder on CES core business activities e.g. income generation, security, health and safety, key objectives, partnership working etc.

|  |
| --- |
| **Job Holder Comments** |
| **Line Manager Comments** |

**11. Physical Demands**

Please describe the physical demands associated with the job and what percentage of time those demands are required e.g. working in a seated position, using basic keyboard skills, lifting/moving heavy equipment/tools, close scrutiny of documents or maps.

|  |
| --- |
| **Job Holder Comments** |
| **Line Manager Comments** |

**12. Working Environment**

Please describe the working environment in which the job holder will be required to operate e.g. office environment, workshop, open woodland/fields with access to shelter in vehicle etc. If more than one operational environment, please give percentage of time spent in each environment.

|  |
| --- |
| **Job Holder Comments** |
| **Line Manager Comments** |

**Job Holder signature……………………………**

**Date……………**

**Line Manager signature…………………………**

**Date……………**