

Title	Job Evaluation Scheme Procedures
Associated Policies	<ul style="list-style-type: none"> • Pay Policy (Support Staff) (TPO/STA/08) • Pay Standardisation Agreement

REVIEWED: January 2019

NEXT REVIEW: January 2020

1. Introduction

- 1.1** The Brooke Weston Trust Pay Standardisation Agreement ensures fairness and equality of pay for support staff roles across its academies. The aim of this document is to outline how the Job Evaluation Scheme will be maintained locally in a robust and equitable manner and provide assurance that staff pay is compliant with the Equality Pay Act (1970).

2. Principles

- 2.1** The Trust is committed to the principle of equal pay for equal work and working in partnership with our staff to ensure that this is delivered. Working in partnership, the Trust will ensure that all jobs within the organisation are evaluated in accordance with the National Joint Council Job Evaluation Scheme, adopted by Brooke Weston Trust.
- 2.2** All members of job evaluation panels will be appropriately trained to ensure the integrity of the scheme is maintained.
- 2.3** In accordance with the Brooke Weston Trust Pay Standardisation Agreement, the Trust will ensure appropriately trained Management Side and Union Side Leads are identified to oversee the ongoing implementation and maintenance of the scheme.

3. Responsibilities**3.1 Trust Board**

- 3.1.1** The Board has responsibility to oversee the Pay Standardisation Agreement and to ensure its associated procedures are in place. This will be monitored through the Remunerations Committee to which this responsibility is delegated.

3.2 Executive Principals and Principals

- 3.2.1** The Executive Principals and Principals are responsible for ensuring their teams are aware of the responsibilities within this policy and to support the implementation by releasing staff, where possible, to attend training and support panels.

3.3 Finance Director

- 3.3.1** The Finance Director is responsible for ensuring the Pay Standardisation Agreement and its associated procedures are effectively and appropriately implemented. The Finance Director is responsible for ensuring that the processes within the Agreement are monitored and any non-compliance is acted upon.

3.4 Senior Finance/HR Manager

- 3.4.1** The Senior Finance/HR Manager is responsible for ensuring there are an appropriately trained number of JE Practitioners (this refers to Job Matchers, Analysts and Evaluators). The Senior Finance/HR Manager is responsible for scheduling panels and for ensuring they are convened in line with the principles of partnership working and provide administrative support to the scheme, including retaining records for effective evidencing of decisions, monitoring and audit purposes.

3.4.2 To provide advice and guidance to Principals on the technical aspects of the job evaluation scheme and to provide an initial screening of jobs prior to them being submitted to panel.

3.5 School-based staff (HR Officer, Finance Officer)

3.5.1 School-based staff responsible for recruitment are responsible for checking that any job submitted for advertising has been evaluated prior to advertisement and for escalating any concerns regarding this with the Senior Finance/HR Manager.

3.6 Principals and Line Managers

3.6.1 Line Managers and Principals are responsible for ensuring job descriptions and person specifications accurately reflect the required work for activities for the post.

3.6.2 Line Managers are responsible for submitting the completed documentation, following authorisation by the Principal, for consideration at panel by the deadline and, to avoid any unnecessary delay, to be available to the panel to answer any questions regarding the job being evaluated.

3.6.3 Line Managers are responsible for supporting the implementation of the scheme by releasing appropriately trained staff to attend the panels unless such an occasion impacts on service delivery.

3.6.4 For re-banding applications, Line Managers are responsible for agreeing the revised job description, person specification and job evaluation questionnaire with the postholder and, following authorisation by the Principal, submitting for re-evaluation.

3.6.5 Line Managers are responsible for ensuring a job has been evaluated in accordance with this Agreement prior to seeking approval to recruit and advertising.

3.7 Trade Union

3.7.1 The support of the trade unions is critical to the successful implementation of the job evaluation process; trade unions are responsible for working in partnership to evaluate jobs fairly and in accordance with the adopted national scheme.

4. JE Practitioners

4.1 The Trust has trained a number of staff as Job Matchers, Analysts and Evaluators (referred to as JE Practitioners). The Senior Finance/HR Manager will be responsible for maintaining a list of trained JE Practitioners and for scheduling panels. In doing this the Senior Finance/HR Manager will endeavour to use each JE Practitioner on a proportionate basis so that the impact on their respective departments is evened out and minimised. Where necessary, further new volunteers will be sought and further training will be provided to those selected so that a critical mass of JE Practitioners is retained.

4.2 JE Practitioners should be as representative of the Trust as practicably possible and spread as evenly as possible across all schools/academies/central team and all levels so that the impact of freeing them up is minimised. To achieve this, the Trust will select staff volunteering to be JE Practitioners based on their ability to fulfil the role of JE Practitioner and the ability of the service to free them up without a significant negative effect on their services.

4.3 Once trained, JE Practitioners have a requirement to attend refresher training every two to three years to update their practise. Where there are concerns about a JE Practitioners performance JE Practitioners may be asked to complete further training or to stop (either temporarily or permanently) their JE duties. JE Practitioners have a responsibility to maintain confidentiality in all aspects of their work undertaken as a panel member. Appropriate disciplinary action will be applied if otherwise.

5. Procedure

5.1 Job Descriptions and Person Specifications Format

The job description and person specification for every member of staff within the Trust should be in line with the following principles:

- Job Descriptions should be written in the standard Trust format which includes a separate person specification available from the Trust's website
- Job descriptions and person specifications must be written based on the job that is required to be done and not on the post-holder
- Job descriptions and person specifications must be written based on a competent replacement post-holder, who has just completed their induction into the role and specifically the person specification, must not be based on an experienced post-holder or specifically to match the skills of the current postholder
- When writing job descriptions and person specifications particular attention should be paid to the person specification to make sure that it reflects all of the essential knowledge, skills and other criteria that are required of the job
- Job descriptions should be written in as straight-forward language as possible and should where possible explain any specific technical terms
- Job descriptions and person specifications should use terms consistently
- Where possible generic job descriptions should be used for groups of staff carrying out the same role – at least to reflect the core of the job. This is to improve consistency
- Where using a generic job description to reflect the core duties, it is vital that variations and duties additional to the core description are included
- With re-grades all job descriptions and person specifications should be agreed between the current post-holder(s) and the Line Manager and authorised by the Principal
- Before submitting a job description and a job evaluation questionnaire for evaluation, the Line Manager must ensure that they are internally consistent (e.g. between the job description and person specification – so a requirement in the person specification reflects a responsibility within the job description) and that they are consistent with other job descriptions within the department, academy and Trust
- The Senior Finance/HR Manager will develop a library of job descriptions based as jobs are matched in accordance with this procedure

5.2 New Posts

Any new jobs within the Trust must be evaluated prior to an advertisement being placed in order that prospective applicants are aware of the correct band and associated pay scale. The Line Manager will be responsible for completing a Job Evaluation Questionnaire with a JE Practitioner for the new job to ensure all of the factor information is recorded.

5.3 No job will be advertised until the banding has been confirmed. All job descriptions must be submitted to the school-based HR Officer/Finance Officer (or those responsible for recruitment) with the 'Date' the post was evaluated and the unique BWT job 'Reference Number' completed to allow a check to be undertaken by the Senior Finance/HR Manager.

5.4 This policy also applies to management of change processes where jobs are changing as a result of the management of change.

5.5 Any exceptions to the above will require formal approval from the Finance Director.

5.6 BWT will review the grading after a period of 6 months in case of any substantial change to the role.

5.7 Re-branding Existing Posts

Where there have been significant changes to a post there should be a rematch or re-evaluation and the whole job must be re-assessed. A JE Practitioner will be dispatched to discuss with the Line Manager whether a new Job Evaluation Questionnaire needs to be completed. A re-banding can result in a lower band, the same band, or a higher band. Where a re-banding results in the down banding of a post then pay protection will apply in accordance with the Trust's Pay Policy.

- 5.8 Requests from a staff member for a re-banding must be supported by the Line Manager in accordance with organisational need and submitted with approval from the Principal. Where a member of staff requests their job is submitted for re-banding and they are not supported by their Line Manager or Principal they have the option to raise the grievance in accordance with the Trust Grievance Policy.
- 5.9 On submission the post holder and or their Line Manager must complete and sign the relevant documentation and produce evidence that the duties of the post have changed significantly and that the post-holder has the necessary knowledge, skills, training and experience to perform the duties. This may be recorded in the form of a Job Evaluation Questionnaire, completed with a JE Practitioner. Please refer to the Senior Finance/HR Manager for any advice or guidance.
- 5.10 Where there has been a significant change to a job e.g. due to the loss of a service/team then the whole job must be re-assessed. Prior to submitting the job for re-banding the Line Manager must first discuss the changes with the post-holder and agree a new job description and Job Evaluation Questionnaire.
- 5.11 The effective date of any change in band for an existing post-holder will be the date the Job Description is agreed by the Line Manager and post-holder, as indicated on the request for review form.
- 5.12 It should be noted that where a staff member has undertaken additional duties for the purpose of personal development the original post is unaltered and the post will not be considered for re-banding. The individual may choose to discontinue the performance of such duties or such duties may be withdrawn following discussion.
- 5.13 Vacant Posts and Minor Changes in Responsibilities**
Jobs should be submitted for re-evaluation where the duties of a vacant post have been reviewed and amended. However, in certain circumstances whereby only minor changes are made to a job then a full evaluation may not be required. It is recommended that a revised Job Evaluation Questionnaire is completed with a JE Practitioner to ensure these changes can be correctly evaluated.
- 5.14 The Line Manager should provide the original matching reference number and a copy of the original Job Description clearly identifying where the changes have been made. The Management Side Lead and Union Side Lead will convene and review the changes, where the job description is over 3 years old, or where more than two factor levels are affected by the changes and/or where the new job matching score is 10 points or less from the bottom or top of the range then the job will need to be submitted to a full evaluation panel in the usual way.
- 5.15 Submitting Job Description & Person Specification for Panel**
Any request for job matching and/or evaluation must be requested by completing the relevant request form, available from the Trust's website, in full and with the appropriate signatures. All requests must include a job description and person specification in the Trust's format. The template is necessary to ensure consistency and that all relevant information is captured in the job descriptions, jobs submitted in the wrong format will not be accepted and will be returned. A JE Practitioner will be dispatched to meet with the Line Manager to complete the Job Evaluation Questionnaire. This must be completed and signed off prior to submission.
- 5.16 Jobs submitted for re-banding require additional authorisation and the staff member's signature. Any application for re-banding will be backdated to the date the job description was agreed and signed by the staff member and their Line Manager.
- 5.17 The job matching / evaluation request form and all relevant documentation should be emailed to jobevaluation@brookeweston.org. Those requiring signature can be scanned in and provided electronically. Paper copies will only be accepted in exceptional circumstances.
- 5.18 Process following Submission**
On receipt of the job matching/evaluation request form and supporting documentation the job will be registered on the central database and issued with a unique job Reference Number. Confirmation of receipt will be issued via email, together with an indication of when the job is likely to be submitted to a panel.

- 5.19 The job description, person specification and job evaluation questionnaire will be saved on an electronic file and passed to the Trust Finance Officer (Payroll) for checking prior to submission to the panel.
- 5.20 The Trust Finance Officer (Payroll) will be responsible for initially screening the job to ensure the following:
- Job description & person specification are fully completed
 - Job Evaluation Questionnaire is complete
 - Organisational chart included in job description
 - Consistency between the job factors
 - Requirements in the person specification reflect the knowledge, training and experience required to perform the duties in the job description
- 5.21 Where there are inconsistencies in the above or factors are missing the Trust Finance Officer (Payroll) will liaise with the relevant Senior Finance/HR Manager to address these issues prior to submission to the panel.
- 5.22 **Job is Banded**
Where a job is banded the job levels will be entered onto the central database from the job match report and the report will be saved to the electronic file using the unique Reference Number and Job Title.
- 5.23 The outcome of the job matching process will be communicated to the Line Manger via email and will include the following:
- Job matching outcome
 - Copy of the job matched/evaluation report
 - Copy of the job profile
 - Details of how to request a review of the job matching
- 5.24 The names of panel members will not be released but will be held centrally for audit purposes.
- 5.25 The outcome from the panel will be copied to the Finance Director for information purposes.
- 5.26 **Job is Not Banded**
In circumstances where it has not been possible to band the job then this will be communicated to the Line Manager via email who will be requested to contact the Senior Finance/HR Manager for advice.

6. Job Matching/Evaluation Panels

- 6.1 The panel will consist of one Management Side and one Union Side, wherever practicable and panels will be convened on a bi-monthly basis to consider posts submitted for job matching or job evaluation. Where a service area is considering large scale management of change or a new service has been successfully commissioned then Line Managers must liaise with the Senior Finance/HR Manager as soon as practicable in order to discuss the possibility of extra panels being convened.
- 6.2 The Line Manager will be requested to make themselves contactable to the panel on the day the post is being evaluated in order to be able to answer any questions they may have regarding the job.
- 6.3 The panel will identify profiles for job matching; all posts will be matched in accordance with the Job Evaluation scheme. On completion the panel members will record their initials on the job matching report together with the profile used, the decision and the date.
- 6.4 The panel will complete the 'Panel Use Only' section of the evaluation request form, this contains full names of panel members for audit purposes.
- 6.5 Where the post cannot be matched the panel should record the reasons in the comments box (e.g. variations, inconsistencies between job description and person specification etc.).
- 6.6 Where posts cannot be matched the panel will give consideration to hybrid matching.

7. Consistency Checking

- 7.1 All jobs will be consistency checked when the job matching score is 10 points or less from the bottom or top of the range.
- 7.2 Jobs will be consistency checked by a panel consisting of the Management Side Lead and the Staff Side Lead. Outcomes of job matching will be checked for consistency against:
 - Other matches within the same occupational group and job family
 - Other local matching within the same pay band
 - National profiles for the same occupational group or pay band
- 7.3 Any inconsistencies will be referred back to a different panel to be reviewed and the outcome of that panel will be final.

8. Appeals

- 8.1 An appeal can result in a lower band, the same band, or a higher band. In all circumstances the appeal must be based on the original job description and person specification submitted to the panel and not one that has been revised.
- 8.2 A revised job description cannot be submitted for at least twelve months from the date of notification of the outcome to the Line Manager except where there is clear evidence that service needs have changed significantly which impact on the job.
- 8.3 **New Posts**
Where the outcome of the panel is disputed the Line Manager may request a review. Such a request must be made within 3 months of notification of the panel’s decision. The request for a review must include why the Line Manager does not agree with the matching outcome and provide written evidence with regards to specific factors to support this.
- 8.4 A different panel from the one originally convened will be asked to review the original decision and the outcome of that panel will be final.
- 8.5 **Re-branding Existing Posts**
Where the outcome of the panel is disputed by the Line Manager or the post-holder a review may be requested. Such a request must be made within 3 months of notification of the panel’s decision. A request for a review must include why the Line Manager or post-holder does not agree with the outcome and provide written evidence with regards to specific factors to support this.
- 8.6 A different panel from the one originally convened will be asked to review the original decision and the outcome of that panel will be final.

9. Implementation

- 9.1 The procedure will be implemented through dissemination to managers within the Trust. Information relating to Pay Standardisation will be published on the BWT website.

10. Training

- 10.1 Training will be provided to all JE Practitioners.

11. Equality Impact Assessment

- 11.1 The Pay Standardisation Agreement has been Equality Impact assessed and will continue to be assessed on a regular cycle.

12. Monitor Compliance

- 12.1 This procedure will be reviewed every two years or before if there are legislation changes. Where non-compliance is identified an action plan will be drawn up and monitored by the Senior Finance/HR Manager. Where remedial action can be taken immediately, the action must be recorded appropriately.