
Guidance for job evaluation panels

1. This guidance is provided to help in the administration and operation of job evaluation panels. It has the standing of recommended practice but it is not contractually binding.
2. A job panel will be convened in line with the reasons outlined in the [Job Grading and Evaluation procedure](#).
3. All staff involved in job evaluation panels or with access to job evaluation data must ensure that they maintain confidentiality throughout the process and not share information with anyone outside the evaluation panel. This includes ensuring that any documentation (electronic and hardcopy) is appropriately secured and that they do not share details or information with other members of staff. Breaches of this confidentiality will be regarded as a disciplinary matter.

Prior to job evaluation panel

4. Once it has been agreed to convene a panel in accordance with the Job grading and evaluation procedure, a signed and agreed job analysis form will be circulated to the panel. The recommended format for the job analysis is the Hay template at Annex A).
5. The panel composition should normally be between three and five people and we will seek diversity in its make up as much as possible, mindful of the size of the panel and operational requirements. The minimum composition of a panel is three people which will include at least one HR evaluator, one union representative evaluator and one staff evaluator.
6. In the event that no union evaluator is available (due to turnover of staff or changes in committee membership) a union nominated member of staff may act as substitute, and a member of the union committee may attend the panel as an observer.
7. In order to keep all trained evaluators up to date with their skills, HR will keep a register of who attended each meeting and will aim to ensure that all evaluators get an opportunity to attend panels on a regular basis. In the absence of panels, HR will arrange practice panels on at least an annual basis.
8. The Hay job analysis and any supporting documents will be sent to the evaluators attending the meeting no less than three days before the panel date. All documents must be stored securely and kept confidential amongst the panel members attending the meeting.

At the job evaluation panel meeting

9. The line manager of the post being evaluated will be invited to attend the start of the panel in case the panel has any questions about the job (with particular reference to the analysis or profile).

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10. A chair and a notetaker will be appointed by the panel members at the start of the meeting to facilitate the discussion and record the meeting. The chair will ensure that there is a record of the panel's evaluation/progress at the end of each job evaluation case. This record will be stored in a folder accessible to the job evaluation evaluators.
 11. HR will bring along all available job evaluations documentation/scores relating to the posts directly above and below the post being evaluated so that it can be viewed in the context of both the other roles. This information will not be shared with the panel until after the panel has reached an initial decision. HR will also have available the central spreadsheet of all job evaluation scores, to facilitate benchmarking with similar posts, after the post under consideration has been evaluated by the panel.
 12. There is no casting vote and agreement will be reached by a consensus of the panel.
 13. In the event no agreement is reached the different evaluations should be noted and the panel will be rescheduled pending the acquisition of further relevant information, if required (which will be circulated to the panel members in advance of the meeting). Any changes to the job analysis/profile should be documented and approved prior of the rescheduling to the panel. In exceptional circumstances where the panel is unable to reach a consensus (after having obtained any necessary information they think is necessary to fully consider the case and taken time to reflect upon this and reconvene) the options are to convene a new panel or send the evaluation to Hay.

After the job evaluation panel meeting

14. After a consensus has been reached, the note taker will circulate a record of the meeting to the panel members for approval within 5 working days. This will include a completed job evaluation rationale form, detailing the breakdown of the job score and the rationale for each score agreed by the panel.
15. Once the meeting record and the rationale form for each post evaluated have been agreed by the panel members, HR will store them in the shared folder.
16. The breakdown of the job score and the short profile for each post evaluated will be logged on a central spreadsheet by HR.
17. All resource issues require a decision from the Resource Review Group (RRG) and HR will send the evaluation outcome to them for a decision before notifying the post holder and line manager of the outcome.
18. Once the evaluation procedure has been completed and a decision taken by the RRG, HR will inform the Unite representative/nominee who was on the panel of the outcome and share the results of the evaluation (including the Hay score and evaluation narrative) and the RRG decision with the post-holder and the line manager.

Annex A

Job analysis interview

Post title:

Post holder:

Group/Area:

Reports to:

Job purpose: (Type here...)

Q. How would you describe your job, in 1 or 2 sentences, to an external person?

Principal accountabilities:

(Type here...)

Q. What are the key results/outputs?

Q. What are your main areas of responsibilities/activities?

Q. Which of these takes priority and/or takes most of your time?

Q. What evidence could you provide to demonstrate that you have achieved your objectives?

Scope and scale of post (Dimensions):

Financial: (Type here...)

Staff responsibility: (Type here...)

Others: (Type here...)

Q. Describe (in quantitative terms) the key areas on which your job has an impact?

Planning and organising:

(Type here....)

Q. How does your work come to you?

Q. To what extent can you plan ahead or is the role reactive?

Q. What constraints are there on your freedom to act in your particular role?

Q. What instructions/guidelines or policies do you have to work within?

Decision-making/judgement:

(Type here...)

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- Q. Give some examples of the types of decisions you have to make?*
- Q. What guidelines are in place to support you in making these decisions?*
- Q. What is your role in making the decisions?*
- Q. Which decisions do you have to refer to someone else?*
- Q. What kinds of problems do you have to solve and who do you involve?*

Relationships – line management (up & down):

Up: (Type here...)

Down: (Type here...)

- Q. Who do you report to? (**up**) / Who reports to you? (**down**)*
- Q. What are you reporting on? (**up**) / What are they reporting on? (**down**)*
- Q. How much contact do you have with them? (**up & down**)*
- Q. How do they manage and monitor you? (**up**) / How do you manage and monitor them?*

Relationships – internal & external contacts:

Internal: (Type here...)

External: (Type here....)

Q. Who are your main internal & external contacts?

Q. Describe the purpose of the contact?

Q. What level of authority do you have to contact or act on information provided?

Q. In a typical week who do you contact and why?

Knowledge, qualifications, skills and experience?

Essential:

(Type here...)

Desirable:

(Type here...)

Q. What skills and experience would a person need to do this post? (essential/desirable)

Q. Approximately how many years' experience would a person need?

*Q. What knowledge and qualifications would a person need to do this post?
(essential/desirable)*

Job challenges:

(Type here...)

Q. What are the most challenging aspects of your job?

Q. What is the most complex part of your job?

Q. What would someone find most difficult about your job?

Context and additional information:

(Type here...)

Q. Outline the overall responsibilities of those who report to the post holder. Provide any further information, not included in previous answers, which would assist others to achieve a better understanding of your job?

Data provided by post holder

Name.....

Position.....

Date.....

Signed off (where applicable) by Line manager

Name.....

Position.....

Date.....

Annex B

SFC Job Evaluation Panel Rationale

Job title: *insert job title of post being evaluated*

Reports to: *insert job title of line manager*

Date of Evaluation: *date*

Job evaluation panel: *insert names of panel members, indicating who was chair and who was note-taker*

Notes: *insert any background information- e.g. why the post is being evaluated*

Factor	Units	Features key to choice of slot
Know-How		
Practical/technical knowledge	<i>insert</i>	<i>insert brief summary of panel's discussion</i>
Planning, organising & integrating	<i>insert</i>	<i>insert brief summary of panel's discussion</i>
Communicating & influencing	<i>Insert</i>	<i>insert brief summary of panel's discussion</i>

Score	<i>insert</i>	
Problem solving		
Thinking environment	<i>insert</i>	<i>insert brief summary of panel's discussion</i>
Thinking challenge	<i>insert</i>	<i>insert brief summary of panel's discussion</i>
Score & (%)	<i>insert</i>	
Accountability		
Freedom to Act	<i>insert</i>	<i>insert brief summary of panel's discussion</i>
Nature of Impact	<i>insert</i>	<i>insert brief summary of panel's discussion</i>

Area of impact (Magnitude)	<i>insert</i>	<i>insert brief summary of panel's discussion</i>
Score	<i>insert</i>	
Total score	<i>insert</i>	
ACC v PS	<i>insert</i>	

Overview of role

Brief outline of the responsibilities of the role and any other relevant information to support the evaluation

Document history

This Policy and Procedure does not form part of SFC's terms and conditions of employment.

Owner: Human Resources

Version number	Changes	Date approved
1.0	Discussed through PPWG and content accepted.	22/01/2015 Ratified by JNCF

Review cycle: where there is a change in elements of the policy or periodically every two years.