



Human Resources

JOB EVALUATION POLICY AND PROCEDURE



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1. Introduction

- 1.1 Surrey Heath Borough Council uses an independent process not too dissimilar to Hay Group job evaluation method. This systematic process has been adopted since 2005 and assesses a job's contribution to the organisation relative to other jobs in the same organisation. The process evaluates the job not the job holder – the assessors disregard whoever is actually doing the job.
- 1.2 Job Evaluation is a process by which posts are graded within Surrey Heath Borough Council's grading structure. When a post is evaluated it is reviewed by a panel of four assessors which include 2 x Strategic Directors/Head of Service, a member of HR who is the chair and a staff representative.
- 1.3 The purpose of job evaluation is to ensure that jobs of equal value receive fair rates of pay and so the process benchmarks internal roles against an objective set of criteria. This is to ensure that employees are fairly treated and also to minimise the risk of equal pay claims. Job Evaluation processes do not take into account market rates or fluctuations which are resolved using different processes such as pay benchmarking.
- 1.4 This policy complies with the relevant employment legislation.

2. Principles

- 2.1 An existing job can only be re-evaluated if the Manager can demonstrate to their Strategic Director or Head of Service:
 - the duties of the post have changed by more than 33%
 - the post holder has been in post for at least six months, and
 - the post has not been evaluated in the past 12 months;

Changes such as an increase (or decrease) in volume of work, or a different way of doing the same thing, or new work but at the same level of



responsibility/accountability **will not** result in a post being submitted for re-evaluation.

It is the responsibility of the Strategic Director/Head of Service to demonstrate to the Chief Executive and Head of Paid Service that a post has changed significantly and therefore needs to be re-evaluated.

In order to manage expectations, the line manager should explain to the employee:

- the basis on which a re-evaluation would be considered
- what changes of responsibility may trigger a change in payscale

2.2 A role may be re-evaluated as a consequence of a restructure within a Service or Team

2.3 The Head of HR, Performance and Communications considers there may be a potential equal pay/value issue

2.4 A vacant post will be re-evaluated if the duties of the vacant post have changed by more than 33%.

2.5 It is important to be aware that a Job Evaluation process may:

- Increase the grade of a post
- Maintain the grade of a post
- Reduce the grade of a post.

3. Policy Statement

3.1 The purpose of this policy is to provide guidance when dealing with requests for Job Evaluations or as a result of a change within a Team or Service.



4. Equality Assessment Policy

4.1 The Council's Equality Scheme demonstrates its commitment to equality internally and externally and ensures that all staff are given an opportunity to contribute to the wellbeing of all who work within Surrey Heath Borough Council. An equality impact assessment has been carried out on this Policy and Procedure.

5. Procedure

5.1 This process applies to all job evaluations:

1	Line Manager updates Job Profile and completes Job Evaluation Analysis Form. It is important that the Job Profile and Job Analysis Form are aligned with the purpose of the Job Analysis Form is to give more in depth information and examples.	Job Profile and Job Evaluation Analysis Form along with guidance notes can be found on the Job Evaluation page on Warbler
2	Strategic Director/Head of Service reviews the Job Analysis Form and Job Profile	<ul style="list-style-type: none"> • Confirms the role accurately reflects SHBC requirements • Any budgetary requirements are clearly understood • Completes Job Evaluation Request form for authorisation of Chief



		Executive and Head of Paid Service unless it is part of a Service/Team transformation in which case the Job Evaluation Request form would not be required as it would be part of a Transformation Report to CMT
3	Chief Executive and Head of Paid Service	Reviews Job Analysis Evaluation Form, Job Profile and Job Evaluation Request Form from Strategic Director/ Head of Service
4	Request for Job Evaluation approved/rejected	<ul style="list-style-type: none"> • Approved – passed back to relevant Strategic Director/ Head of Service who will liaise with HR Manager to arrange a JE Panel • Rejected - passed back to relevant Strategic Director/ Head of Service with explanation
5	Job evaluation panel	Each of the panel consider the Job Evaluation request individually using the Job Analysis Form and Job Profile (new and existing if re-evaluation) before the panel meeting and then discuss as a group to agree on level for each of the seven criteria's in the Job Evaluation Guide HR Chair then calculates the scores awarded by the panel relating to each of the levels awarded against the seven criteria's. The total score from this process dictates the grade of the post.
6	Outcome reported back to Chief Executive by the HR Chair via the Job	Chief Executive to give approval for the grade to be applied to the role or discuss



	Evaluation Request Form and advises appropriate Strategic Director/Head of Service	with appropriate Strategic Director/Head of Service if not approved.
7	Strategic Director/Head of Service will advise HR of outcome and effective date if a new grade is to be implemented and the scale point of the grade.	The effective date of the new grade will be the date of the Job Analysis request form unless otherwise advised and reason given so an audit trail is available if requested.
8	HR will send an outcome letter to Strategic Director/Head of Service and copy in the line manager requesting the Job Evaluation	Strategic Director/Head of Service and Line Manager would advise the member of staff if the post evaluated is occupied. There is a right of appeal and the Job Evaluation Appeal Request can be found on Warbler
9	Actions if there is a grade change following Job evaluation	<ul style="list-style-type: none"> • Grade increase and the post is occupied, the member of staff will be sent relevant documentation as detailed in point 10 below • Grade increase or decrease and the post is unoccupied, advertising for the post can commence subject to recruitment authorisation through Staffing Resources Form • Grade decrease and the post is occupied then salary protection arrangements will apply as detailed in section 8 of Organisational Change Policy



10	HR to send Variation of Contract or new Staff Terms and Conditions of Employment, whichever is appropriate to the member of staff if post is occupied.	Member of staff will be sent the appropriate written communication advising of the effective date, grade and scale point.
11	Payroll	HR will advise Payroll of any changes in salary and the effective dates as detailed in the documentation sent to the member of staff (see point

6. Appeals

- 6.1 An employee who is dissatisfied with the outcome of an evaluation may make an appeal providing full reasons for that appeal with any appropriate supporting information. The appeal panel will only consider the contested areas outlined in the appeal.
- 6.2 As a first step, the employee should discuss the appeal with their line manager to ascertain if there are grounds for an appeal.
- 6.3 The employee with their Line Manager may then submit an appeal using an appeal form found on [Warbler](#) detailing the areas of appeal as detailed in the Job Evaluation outcome letter. The Strategic Director/Head of Service will then discuss the case with the Chief Executive to agree if there are grounds for an appeal.
- 6.4 If there are grounds for an appeal, it will be heard by a panel of four – two Strategic Director/Head of Service, Staff Representative and HR to chair. The HR Representative will be the same as that on the original panel to give some continuity and context to the appeal panel. All other panel members will be different. This is so there is a reference point from the original panel member and then points of appeal will be discussed between all four



members of the panel. The panel will individually score before the appeal meeting as with the original JE panel and detailed in Section 5, point 5 in the process table.

6.5 Possible grounds for appeal may include:

- The appeal letter provides new information that was not previously available to the assessors.
- An equivalent job is more highly graded and paid, (it should be noted that this will not automatically result in a re-grading)
- The policy has been wrongly applied

6.6 The effective date of any successful appeal will be agreed by the Chief Executive and Strategic Director/Head of Service

6.7 Any appeal against the grading of a post will be exhausted by this process, the outcome of which will be final. There will be no further right of appeal, either within or outside the Council.

7. Frequently Asked Questions

Q. What is job evaluation?

A. Job evaluation is a tool for determining the 'size' of a job, usually in the form of a number of 'points' (i.e. a job with 400 points, is a bigger job than one with 200 points).

It also allows us to compare different jobs, which in turn enables us to determine where jobs should be placed on the pay scales, thus ensuring equal pay for work of equal value.



Q. Where do I find information on the points that are awarded as detailed above?

- A. These points are not published or shared with staff to ensure the process is completely fair and paperwork is not prepared by looking at scores they are trying to achieve to get a specific grade

Q. Who benefits from job evaluation?

- A. Job evaluation brings transparency and fairness regarding the way jobs are graded and placed on the pay scales demonstrating consistency to all staff.

Q: How do I submit my job for evaluation?

- A. Instruction for re-evaluation (or evaluation in the case of a new post) comes only from the Strategic Director/Head of Service. Therefore, your line manager would review your job description and forward it to your Strategic Director/Head of Service.

It is worth noting that only significant alterations to *the level of responsibility in an existing job profile* are likely to lead to the need to re-evaluate the post. It is also worth noting that it is the minimum requirements of the post that are evaluated, not the employee's performance within that post.

To illustrate, changes that are *unlikely* to result in a changed evaluation outcome are:

- an increase (or decrease) in volume of work, or



- a different way of doing the same thing, or
- new work but at the same level of responsibility/accountability

Q. Who sits on a Job Evaluation Panel?

- A. The panel has four members – two Strategic Directors/Head of Service not connected with the service the evaluation request has come from, Staff Representative and a member of HR who will chair the meeting

Q. How will the panel avoid making subjective judgements when assessing job size?

- A. The Strategic Director/Head of Service or Line Manager will be invited to attend the panel and present the job evaluation case. Panels will seek further clarification or information if they feel it is necessary.

Q. What happens if my job is unique and no one on the Panel understands it?

- A. The panel will ask the Strategic Director/Head of Service or Line Manager their questions and if they still require clarification the panel will be adjourned whilst further details are obtained.

Q. What happens if I carry out the same job as some of my colleagues?

- A. In order to ensure consistency and fairness, where two or more staff members carry out the same job, one job description (a 'generic' job description) can be submitted to cover all these staff.



Q. When will I hear the outcome of the evaluation?

A. Outcomes of all JEs and appeals will be submitted to Chief Executive for review before implementation. Following this review the Strategic Director/Head of Service and line manager will be informed of the outcome.

Q. Will a role be compared to the grading of other roles at a job evaluation panel

A. The panel compare the role requirements against objective criteria within the Job Evaluation Policy. They do not compare against other roles. This can be done as part of an appeal if the appellant identifies specific roles against which they wish their job to be evaluated.

Q. Who can appeal the outcome of a JEP

A. The appeal must be submitted by the job role holder (or the line manager in the case of a vacant role). The job role holder must identify clear grounds for appeal.

Q. What happens if panel members disagree on the level of a given factor.

A. The evaluation will be referred to the Head of HR, Performance and Communications or the Head of Paid Service in their absence (or in the case of a conflict of interest) for a final decision.

Q. Does criteria need to be essential in a job profile for it to be considered in the scoring of a role.

A. Criteria which are desirable will also be included in the evaluation, however they will carry less weight than essential criteria.

Q. Does changes in a role need to be permanent to be considered as part of the job evaluation process.

A. Yes, they do.

Q. Are job evaluation factors equally weighted in the determination of the outcome of a job evaluation panel

A. No – some criteria carry a higher weight than others.



Q: Do you compare the role with roles outside the organisation when undertaking the job evaluation?

A: No – the job evaluation is an internal benchmarking process against objective criteria. HR undertake an external pay benchmarking exercise if a Head of Service requests this which will look at market rates for roles, which is a separate process.

