

# Southwark Schools Human Resources – Guidance for Schools

## HR top tips for successful job evaluation

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### 1. Introduction

Job evaluation is the term used to the process the HR team will follow to determine the value of a particular post relative to others and assign it to a grade on our support staff pay scales. It is not used for teaching posts, which are assigned a pay range in accordance with the School Teachers' Pay and Conditions Document.

This document explains how to request a job evaluation and the process we will follow when such requests are received.

Our suite of model job descriptions is a useful starting point for schools. These have already been evaluated and assigned grades and in most cases, these will suit the needs of your school. Where you wish to make significant changes to these or if you are thinking about creating a post for which there is no model job description, then it will need to be evaluated. The HR team can provide this service on behalf of schools that trade with us.

### 2. Points to note

Changes in the accountabilities and reporting arrangements of one post can sometimes affect the evaluation of other posts in the same structure. Your HR Business Partner can advise you on this and help you identify whether other posts should also be considered.

Job documentation used for job evaluation purposes creates the foundation of your recruitment processes, personal work and development plans and informs performance appraisal. It may be subject to external scrutiny where, for example, an equal pay claim is made.

Job descriptions should be reviewed regularly to ensure they remain up to date. A post will not however be considered for re-evaluation unless there is a significant change. Again, your HR Business Partner can advise you on this. A significant change could be a change to the overall purpose of the job (the reason that the post exists), the accountabilities (what is done and why), or the staffing structure (relationship with others in the hierarchy). It is normal that individual tasks required to get the job done will vary over time but this will not always be a prompt for re-evaluation.

### 3. When a job should be evaluated

There are two occasions when a job should be evaluated:

- When a new job is created (please be aware you should not advertise a job until it has been HAY evaluated).
- When an existing job has had significant change and needs re-evaluating.

A post will not be considered for re-evaluation unless there is a significant change. This may include changes to the overall purpose of the job (the reason that the post exists), the accountabilities (what is done and why); or the staffing structure (relationship with others in the hierarchy). It is normal that individual tasks required to get the job done will vary over time but this is not a reason for re-evaluation. Individual members of staff cannot submit their own role for re-evaluation.

### 4. How to request a job evaluation

The first stage will be to discuss your plans with your HR Business Partner. They can help you determine which roles need to be evaluated and advise you on how to put the information together for evaluation. Once your job documentation is ready, send it by email to your HR Business Partner.

Your HR Business Partner will review the information provided to ensure it is complete and liaise with you to address any queries arising. Once complete, they will arrange an evaluation on your behalf and confirm the outcome to you.

All documentation must be dated to ensure accurate version control and include:

- the completed job evaluation questionnaire (which contains the job context information and structure chart)
- job description and personnel specification.

**For existing posts:** it is useful for you to track your changes against the original job description for ease of reference and confirm the current grade.

Where additional duties are cited as the reason for the change, it should be clear which post was doing the duties previously and the relevant amended documentation provided. If it is a "new" function an explanation should be given why the additional duties are required.

**For new posts:** the consultation document is required explaining the reasons for establishing the post, giving background and identifying any posts deleted as a consequence.

## 5. Content of job descriptions

The job description should provide a concise description of the role and its main areas of responsibility. Our template job description should be used and is divided into the following headings:

**Purpose of the job:** a succinct statement which outlines the reason why the post exists. Generally this should be a few short sentences.

**Principal accountabilities:** the main areas of responsibility, ie what is done and why, not how. They are not the same as tasks or actions. Many tasks or actions may make up one area of accountability and may change without altering the essential nature of the post.

Accountabilities should:

- Be timeless unless the purpose of the job changes significantly
- Be few, any more than 12 should be challenged
- Describe end results not individual tasks
- Be precise and realistic
- Avoid references which will become outdated (e.g. a named working group)
- Avoid reference to time limited initiatives, or matters of conduct or development.

**Job context:** this is information about the wider context of the role and how it fits into the school as a whole. This should include:

- The size and nature of the school, e.g. age range, pupil profile, community profile
- Where the post sits in the structure of the school
- Key objectives which shape the manner in which duties are performed, e.g. values and ethos of the school, development plans
- Financial responsibilities
- Key contacts (e.g. external bodies) and what this involves
- A summary of the conditions of service, e.g. teachers or support staff terms, grade, pension scheme

## 6. Content of person specifications

This is a vital document which sets out the essential criteria (i.e. the minimum requirements) that a candidate must have in order to successfully deliver the requirements of the role. It is used to inform your selection processes for the role.

It may also, but does not have to, include desirable criteria used for selection between candidates if a large response to a recruitment campaign is expected.

All criteria in the person specification must relate to the duties and responsibilities set out in the job description. Your HR Business Partner can provide you with guidance on this. An overly onerous person specification will limit responses to your recruitment campaigns.

The specification is set out in three sections:

**Knowledge:** this should include any mandatory qualifications for the role and any relevant legislation, initiatives and/or processes etc that the post holder must have an understanding of.

**Experience:** some roles may require experience of particular work or responsibilities. In order to avoid inadvertent age discrimination, please avoid excessive requirements such as '5 years' classroom experience'. Ensure you explore the quality of experience required, rather than focusing on the length of experience.

**Skills:** this should set out the personal skills, attitudes and competencies required of the post holder.

## 7. Top tips for successful job evaluation

Always review your documentation before submitting it for job evaluation to ensure consistency. During the drafting process it can be easy to overlook areas that have changed and inconsistencies can arise. For example, ensure the number of staff supervised stated in the job context matches the structure chart and that job titles are consistent throughout. Your HR Business Partner will liaise with you to address any inconsistencies in information provided but this can delay your evaluation.

Similarly please take time to check that the same responsibilities are not duplicated in job descriptions at different levels within your staffing structure. It is important to establish the flow of responsibilities and map out the processes accurately so it is clear which post is responsible for what within the structure.

Avoid over using descriptive phrases as this can diminish their value. Phrases such as 'preparing strategy, negotiating, reviewing policy' etc. will not necessarily be accepted at face value, but will be considered in the context of the post and the structure.

Ensure the wording in your job descriptions is clear and understandable to someone outside of your school. Avoid jargon and abbreviations wherever possible. It is helpful both for evaluation and for recruitment purposes to avoid 'slipping into shorthand'.

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