



FCO SERVICES

Job Evaluation Policy, Procedure and Guidance

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CHANGE HISTORY

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1.1	22/11/2013	Updated Glossary; Paragraph 6.3; Page 15 (Knowledge, Skills and Experience); Appendix 3 (JEGS Scoring)
2.0	01/03/2015	Introduction of Grading Guidance. Updated process.
3.0	08/10/15	Updated formal evaluation process.

GLOSSARY

Term	Meaning
Job Evaluation	The overarching process to evaluate the weight of a role and to determine its grade.
Job Evaluation Grading Support (JEGS)	This is an analytical, points-based system which is used by trained assessors to rank roles from A1 to Band D7. It is called on where the grade is less clear and cannot be determined through the use of grading guidance alone. It should not be confused with job evaluation, which is the whole process for evaluating roles.
Grading Guidance	This is a tool which can be used by managers and provides an analytical matching of roles to grades. It applies to posts from A1 to D7. There is currently no grading guidance for SMS posts.
Paper-based JEGS Assessment	This is part of the formal JEGS Assessment process and involves the JEGS Assessor collecting as much written information about the role and using this to score the post on the JEGS system.
Full JEGS Evaluation	This is part of the formal JEGS Assessment process and involves the JEGS Assessor collecting as much written information about the role and then interviewing the role-holder to check anything which is unclear and to explore the role in greater detail. The role is then scored using JEGS. This is a more resource intensive process and is used where evaluations are particularly complex or controversial.
Job Matching	Determining the grade of a new role through matching it to existing roles in the business that undertake the same duties. E.g. Investigating Officer, Project Manager and Project Control Officer.
Towers Watson/ Beamans	Towers Watson is the organisation who manages the online JEGS system. Beamans is the Cabinet Office approved organisation who does the training for the JEGS system.
Role profile	A role profile outlines what is required to ensure successful delivery of the role. Role profiles provide details about the work that the role will do and the standards expected of the role, together with any budget or staff management responsibilities.



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1. POLICY

Our policy is that the grade of all roles will be evaluated. The correct grading of posts is important. Job evaluation supports objective, fair and consistent decision making about the weighting of job roles. It provides a basis for a fair and orderly grading structure, underpins the pay system and supports our credibility. It helps to achieve value for money by ensuring work is carried out at the right level and helps to ensure equal pay for work of equal value thus preventing discrimination. It is supported by both management and trade unions and is underpinned by a robust quality framework developed and maintained by the Cabinet Office.

1.1 Policy Principles

Job evaluation **must** take place when:

- a new post is being created,
- there is a substantial and material change to a post
- there is a significant doubt about the grade.

Job evaluation **may** take place when:

- a reorganisation is taking place which may affect the grading of the post
- a grading review is taking place within the part of the organisation which includes the post
- a review of the post has been requested by the incumbent of a role or their manager.

Throughout the job evaluation process consideration should be given to the grade of any other similar roles across the business. Where the duties of a new role are the same as an existing role that has already been evaluated, job matching can be used to help determine the grade of the role.

There are two methods available to evaluate the grade of a role:

Grading Guidance	A tool designed to evaluate the grade of new and existing roles. It provides an analytical process of matching of roles to grades, offers a good level of assurance and is less resource intensive than a formal JEGS evaluation.
Formal Job Evaluation and Grading Support (JEGS) Assessment	JEGS is an analytical, points-based system which is used by trained assessors to rank roles from A1 to D7. It is a thorough process which is called on where the grade is less clear and cannot be determined through the use of grading guidance alone. It is also used where the grade is disputed and for pay and grading reviews. There are two approaches to conducting a formal JEGS assessment; paper-based and a full evaluation. A full evaluation is more resource intensive and is used where evaluations are particularly complex or controversial.



Grading guidance should be used in the first instance. Where a role cannot be graded using grading guidance, there may be a need to request a formal JEGS assessment by a trained JEGS assessor.

Individuals are able to request a review of their role and should speak to their line manager in the first instance. Evaluation of the role will only be undertaken upon request if there are sufficient grounds to warrant a review of the grade.

Where the role forms part of a number of roles doing the same duties (e.g. drivers) a pay and grading review may be required. Further advice should be sought from the HRBP.

1.2 Grades

FCO Services grades are equivalent to Civil Service grades however the grade names are different.

Civil Service grade	FCO Services grade
Administrative Assistant (AA)	A1
Administrative Officer (AO)	A2
Executive Officer (EO)	B3
	Technical Pay Band 3
Higher Executive Officer (HEO)	C4
	Technical Pay Band 4
Senior Executive Officer (SEO)	C5
	Technical Pay Band 5
Grade 7	D6
Grade 6	D7

1.3 Grading Factors

The grade of a role is based on the 7 factors below. Each factor determines the level of responsibility in the role.

Factors	Description
Knowledge and skills	A combination of education, experience and training. Considers the balance required to perform the job competently. All grades will need to demonstrate that they meet the required knowledge and skills identified in the relevant Civil Service Competency Framework.
Contacts and Communications	Measures the contacts and communications the role holder has to have with people inside and outside the organisation to carry out the role effectively. It includes all business-related communication, whether conducted face to face, by telephone or in writing.
Problem solving	Measure the intellectual demands of the role or the thinking skills required to tackle and solve the problems and issues arising. It includes analysis, judgement, initiative and original thought as well as the size and scale, depth and breadth of the problems and the involvement of other people in their solution.
Decision making	Looks at the decision making aspects of the role from two angles:



	informing and advising (the extent of the role’s influence on decisions taken by others); own decisions (decisions made by the role holder without reference to a higher authority).
Autonomy	Relates to the freedom of action in the role, assessing the level between having to follow clearly defined procedures or being allowed to operate within broad parameters.
Management of Resources	Looks at the responsibility of the role for delivering business objectives through the management of people, finances and other resources.
Impact	Summarises the impact of actions taken by the role holder on the organisation. It is the likely impact in the normal course of events that is assessed, not extremes or unlikely occurrences.

1.4 Scope

Job evaluation can be applied to all FCO Services roles from grades A1 to D7 (inclusive). Senior Management Service roles are evaluated under the Job Evaluation for Senior Positions (JESP) process.

1.5 Roles and responsibilities

Employees

- Maintain role profile and comply with job evaluation process.

Line managers

- Ensure role profiles are up to date, accurate and correctly graded.
- Where a role may not be correctly graded, check the grade using grading guidance.
- Ensure role profiles and job analysis forms sent for job evaluation are complete and accurate with no track changes.
- Provide information where requested in a timely manner.

HR Team

- Log job evaluation requests and maintain records.
- Review roles using grading guidance and ensure they are correctly graded, referring any borderline or contentious roles to a JEGS Assessor for further review.
- Provide advice on the job evaluation process.

HR Business Partners

- Work with line managers on designing content of role profiles.
- Review roles using grading guidance and ensure they are correctly graded, referring any borderline or contentious roles to a JEGS Assessor for further review.
- Work collaboratively when reviewing the grade of a role to ensure fairness and consistency with other similar roles across the organisation.
- In conjunction with the JEGS Lead, approve requests for formal JEGS Assessments.
- Work with managers on people issues arising from the job evaluation outcome.



JEGS Assessors

- Ensure the role profiles are correctly graded and records are maintained.
- Comply with this policy and process; ensuring evaluations are completed in a timely manner.
- Maintain knowledge through ongoing training, ensuring retention of JEGS Accreditation.

JEGS Lead

- In conjunction with the HRBP, approve formal JEGS Assessments requests.
- Final approval of grade outcome for formal JEGS Assessments.

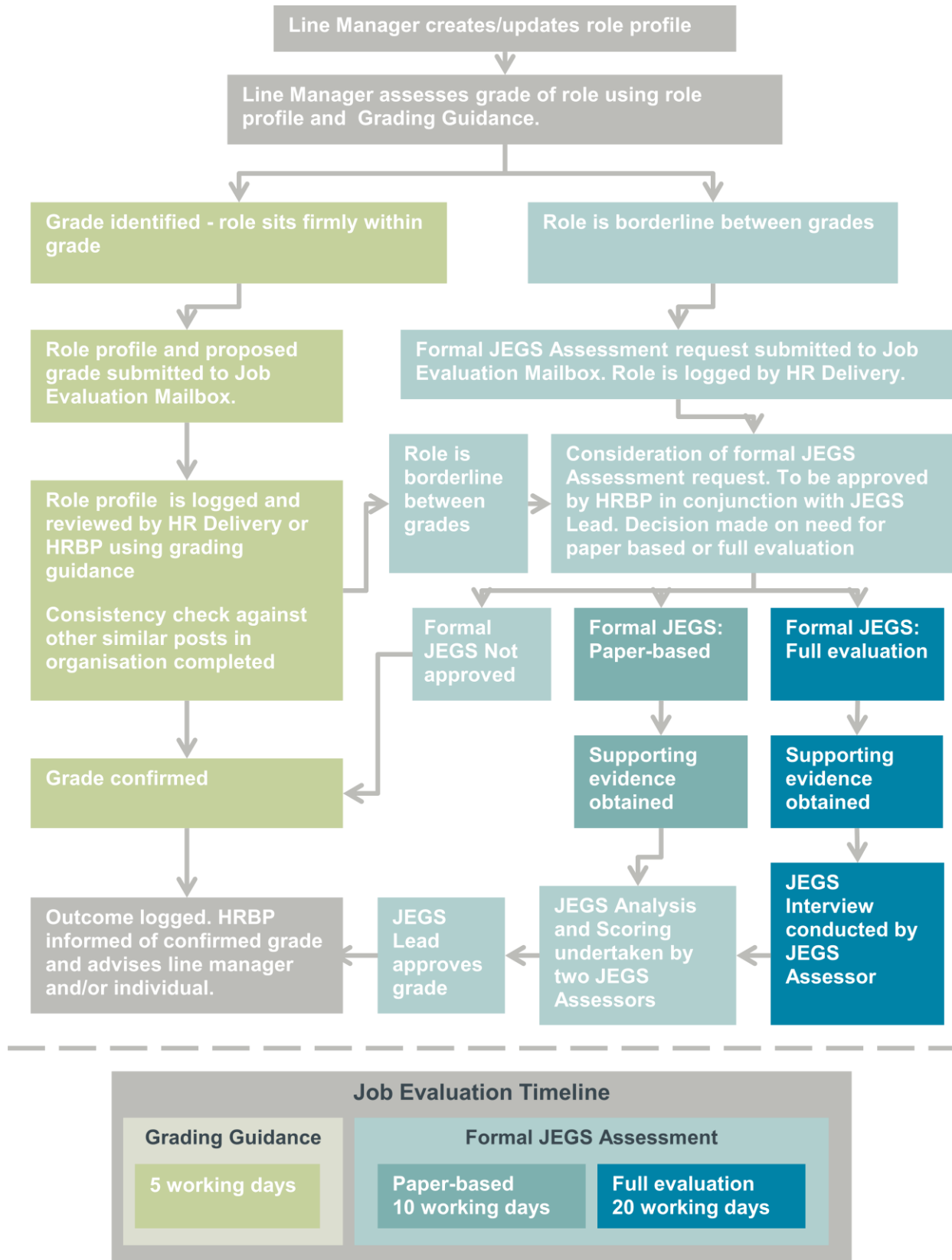
Directors and Senior Managers

- Ensure that those with line management responsibility are familiar with this policy and procedure.
- Oversee the application of correct grades within their structure.



2. PROCEDURE

2.1 High level process flowchart





2.2 Role Profile

All managers have an ongoing responsibility to ensure all roles they are responsible for are correctly graded and have an up to date role profile.

Managers are responsible for ensuring the grade of a role is evaluated when:

- a new post is being created
- there is a substantial and material change to a post
- there is a significant doubt about the grade.

Further information on job design and drafting role profiles can be found on The Hub. Support can also be obtained from the relevant HR Business Partner (HRBP).

2.3 Job Evaluation using Grading Guidance

All roles should initially be assessed by the line manager using Grading Guidance, with support from the HRBP where required. It will depend on the outcome of the line manager's assessment as to what further action is required:

Grade identified

If the proposed grade of the role sits firmly within one of the grades in the grading guidance, or there are other roles in the organisation carrying out the same duties, the line manager should submit the role profile with the proposed grade to the mailbox to request confirmation of the grade.

The request will be logged and the grade of the role reviewed by a member of the HR team or HRBP using grading guidance. A consistency check will be undertaken to ensure consideration is given to the grades of other similar roles across the business. Where a role already exists with the same duties, job matching can be used to determine the grade. Further information on job matching is provided in our [guidance](#) section. The outcome of the review will be confirmed to the HRBP and line manager within 5 working days of receipt of all the necessary information. Where relevant, the HRBP will advise on next steps.

If, after review by a member of the HR team, the role is borderline between two grades the role will be considered for a [formal JEGS assessment](#). Further information may be requested from the line manager.

Borderline

This process is used where after assessment using grading guidance the role is borderline between two grades.

A request for a formal JEGS assessment should be submitted to the Mailbox complete with role profile and job analysis form. The request will be logged and considered by a JEGS assessor. Consideration of the request will involve checking the grade of the role using grading guidance. If the role sits firmly within a grade the result will be confirmed to the HRBP and line manager within 5 working days of



receipt of all the necessary information. If the role remains borderline a [formal JEGS assessment](#) will be carried out.

2.4 Job Evaluation – Formal JEGS Assessment

Formal JEGS assessments should only be carried out where the grade cannot easily be determined using grading guidance alone or where a pay and grading review is required.

All formal JEGS assessments require the support of the line manager and approval from the HR Business Partner in conjunction with the JEGS lead.

Formal JEGS assessment requests should be submitted to the Mailbox. The request will be logged and considered by a JEGS assessor. Consideration of the request will involve checking the grade of the role using grading guidance. Formal JEGS assessments will only be approved where after assessment doubt still exists about the grade. The HRBP in conjunction with the JEGS lead will decide, based on the complexity of the case, whether a paper-based JEGS assessment is appropriate or whether a full JEGS evaluation is required.

Supporting Information

If a formal JEGS assessment is approved the following information should be provided:

Role Profile	Outlines the main duties of the role. Please ensure that the organisation chart section is complete. ([REDACTED] regarding the inclusion of names should be followed).
Job Analysis Form	Describes the role against the Grading Factors.

When compiling the information, advice can be obtained from the HRBP or the HR team.

Interviews (full evaluation only)

If a full evaluation is being carried out, the incumbent of the role and the line manager will be interviewed by a trained JEGS Assessor. This is to gain a greater understanding of the role, to verify the information given and to clarify any points. A record of the interviews will be made and the individual and line manager will be required to sign to confirm its accuracy before the formal JEGS process continues.

Analysis and Scoring

For both paper based and full evaluations, a panel of 2 trained JEGS assessors will conduct the analysis based on all information available. The role is scored using the points-based Towers Watson JEGS system. The resultant score will determine the



job weight and grade of the role. The final grade will be signed off by the JEGS lead. A Trade Union representative may request to observe the process.

Notification of Outcome

The JEGS assessor will inform the HRBP of the outcome. The HRBP will inform the line manager and discuss next steps, including providing advice on any people implications arising from the grading outcome. This may involve initiating recruitment activity, reassessing the duties of the role to provide a better quality role or advising on implications for the individual if the role is filled and a grade change has occurred.

Timing

It will depend on the circumstances for each role as to how long the JEGS Assessment process will take. From receipt of the request and all required information the following timelines apply:

- Paper-based assessments should be completed within 10 working days.
- Full evaluations are likely to take longer and should not take more than 20 working days.
- Full pay and grading reviews will of course take longer than 20 days and will depend on the circumstances of the matter. Timescales for delivery will be agreed at the outset with the business area sponsoring the request.

2.5 Review

If a new role is evaluated, it should be allowed to establish itself (for example, for about 6 months) and the manager should then check that the original grading decision is still appropriate.

The JEGS team will also undertake pay and grading reviews on a periodic basis to guard against grade drift in the department.

2.6 Appeals

There may be times when a manager or individual is dissatisfied with the grading result. Individuals should discuss the matter in the first instance with their line manager. The line manager should then discuss the case with the HR Business Partner who will, in conjunction with the JEGS lead, consider and decide on whether there are sufficient grounds to review the outcome. The post-holder should be informed about the decision.



3. GUIDANCE

3.1 Role Profile

When establishing the grade of a new role, the process begins with ensuring there is a clear, accurate written role profile. More detailed guidance on job design and drafting a role profile can be found in our Guidance.

The form may also be helpful in setting out the aspects of the role which need to be considered in deciding its grading.

When drawing up a role profile, it is important not to include any job requirements which might particularly disadvantage employees who share a protected characteristic when compared with others (such as women or people of a particular age or racial group) unless they are job specific and can be objectively justified as necessary under the Equality Act 2010. Managers should consult HR if they think a necessary job requirement might adversely affect employees who share a protected characteristic. It is not necessary to make generic adjustments to a role profile to take into account unknown potential disability requirements. Where the requirements of the role are such as may substantially disadvantage disabled employees compared with non-disabled ones, reasonable adjustments will have to be made at the time when the role is filled by a disabled person.

3.2 Job Matching

Job matching involves checking whether any similar roles already exist in the organisation to help determine the grade of your role.

The role title is usually a good reference point from which to start looking, although care must be taken not to rely on the role title only as naming conventions across business groups and teams can differ.

Although there is no central database held of all roles, HR maintain a log of roles that have previously been evaluated using JEGS and Grading guidance within the last few years. A quick cross reference can be completed to see if any roles exist with similar role titles.

HRBP's will also have a broad knowledge of the roles within their business area and may be able to advise if there is a similar role either within their area or, through discussion with other HRBP's, a different part of FCO Services.

If a similar role is found, the role profiles for each role will need to be reviewed to see whether the duties and responsibilities are sufficiently similar.



3.3 Using the grading guidance

Grading guidance is not intended to be a comprehensive description of every activity which might be performed at a certain grade, nor is it a description of how a role should be performed. Rather, it provides an illustration of the range of activities which might be expected to be carried out in typical posts at each level. It aims to give a picture of the quality of work at each level as a guide for line managers. The tasks and activities described at each level are not exhaustive and should not be regarded as a checklist which must be covered off in its entirety.

The characteristics described are intended to reflect the main body of work carried out by a role-holder as part of everyday, effective performance. What matters most is the overall balance of the role - it is the overall assessment which will determine its grade. Unusual or infrequent activities, whilst not unimportant, should not be included in the overall assessment.

3.4 Grading the role

There are a range of role types and functions within each of the seven grades. Some roles will inevitably fall on the border between grades and here it may be necessary to reorganise work to fit roles better to the allocated grade, remembering that it is generally better to have good roles at one grade, rather than poor roles at the next level up.

When determining the grade of a role, there are a number of things to remember.

- Assessing a role is about the role and not the person occupying it
- Ignore the characteristics and qualities of the role-holder (for example gender, age and experience) and focus on the role
- Focus on the facts, not on preconceptions or assumptions
- Consider the role over a representative period of time e.g. 12 months
- Consider the demands of the role against each of the factors
- Current grade, pay levels or status are not necessarily indicators of where the role might be placed
- The volume, productivity and work output of the role should not be confused with the level of accountability in the duties and responsibilities required from the role (i.e. the job weight).
- Role titles may be misleading or used differently in different parts of the organisation
- The focus should be on the overall balance of the role; avoid focusing on the most complex or least complex aspects
- Duties of a higher or lower graded role, which are undertaken on a temporary basis, should be discounted for grading purposes.

3.5 Management Levels

There is no general obligation or need to use every grade available. Managers may wish to consider how the number of management tiers could be reduced to the minimum necessary. It is not unusual for employees in grades at all levels to report to managers who are not in the grade immediately above their own.



Annex A - Contacts

	Name
HR Business Partners	Network Services - [Redacted]
	Technology – TBA – [Redacted]
	Security and Property Group – [Redacted]
	Corporates – [Redacted]
HR Team	[Redacted]
	[Redacted]
	[Redacted]
JEGS Assessors	[Redacted]
	[Redacted]
	[Redacted]
	[Redacted]
	[Redacted]
	[Redacted]
	[Redacted]
JEGS Lead	[Redacted]
	[Redacted]