**LOCAL GOVERNMENT SERVICES JOB EVALUATION SCHEME:**

**TECHNICAL NOTE NO 16: USING ROLE PROFILES TO IMPLEMENT JOB EVALUATION**

**1.      Introduction**

1.1     This Technical Note describes how national role profiles can be used in the process of job evaluation. Profiles are an accepted tool of job evaluation used to measure jobs. Used properly, profiles can speed up the process of job evaluation because they do not require the completion of detailed questionnaires, which can often be a lengthy process. Many organisations have developed benchmark profiles for a representative sample of roles against which commonly occurring jobs or emerging jobs are matched. Additionally, the NJC JETWG has developed national profiles covering, public health staff, school support staff, social work staff and Craftworkers. A full list is attached as **Appendix 1**.

1.2     Jobs can vary widely across authorities, so not every job with the same job title will match to the same profile. Individual authorities may also have different conventions to reflect local considerations and this can lead to variations in scores between organisations for what appear to be the same job. This is a consequence of local pay and grading structures.

**2.      What are Role Profiles?**

2.1     Profiles are summaries of typical roles, including:

- Descriptors of demands under the relevant NJC Job Evaluation Scheme Factors, including knowledge, skills and responsibilities and
- Indicative evaluations of these demands, which may include ranges to enable more jobs to be matched

2.2     Profiles are not:

- Job descriptions or intended to replace job descriptions. Job descriptions should not follow the national role profile format nor should they be exclusively competency-based as this is not helpful for matching purposes. Their format and content are matters for individual organisations to decide in partnership with the recognised unions
- Statements of what ought to be done, but statements of what is done
- Instructions on how to organise staff
- Translations of scores into grade boundaries or pay rates

**2.3**     Profiles are developed:

- to facilitate the implementation of job evaluation
- as a tool for evaluating similar jobs as part of a matching process. See **Appendix 3**

### 3.      National Role Profiles

3.1     The status of the national profiles is advisory rather than prescriptive. They have been developed to help NJC scheme and other job evaluation scheme users to achieve consistency, transparency and fairness in:

- benchmarking those jobs which have not yet been evaluated
- developing career structures where these do not exist or are being developed
- acting as a check on evaluations already conducted

3.2     Social Work profiles are published in NJC, GLPC and Hay JE formats. Public Health Profiles are published in the NJC and GLPC JES format, while Craft and School Support Staff Profiles are published in the NJC JES format.

3.3     In the Craft, Social Work and Public Health Profiles, there are statements of demand under each of the factors and an extract from the factor level definition of the scheme used.

### 4.      Development of Role Profiles

4.1     Whether they are profiles drawn up by individual organisations or national profiles, the profiles are developed through job information garnered from a variety of sources, including job evaluation questionnaires, job descriptions, and person specifications. Where the NJC JES is used, for example, a joint evaluation panel of management and trade union representatives, working in partnership, will consider all of the information under the different factor headings of the 13-factor NJC job evaluation scheme and draw up a profile accordingly. In some cases, the text of the scheme factor is included as additional data against which to measure jobs.

4.2     The development of job profiles and job matching should not be carried out by those who have not had training in equalities, the use of the job evaluation scheme and the matching of job information to profiles.

### 5.      Matching Jobs to Role Profiles

5.1     Prior to matching to job profiles, up to date job descriptions and person specifications should be agreed between the job holder/s and the line manager. This is good HR practice and is essential in matching accurately job information.  It may be necessary to draw up an effort and environment proforma to enable information that is not normally contained in a job description or person specification, to be captured.[1]  A sample proforma is attached as **Appendix 2**. (Note: this will not be needed if the organisation is using web-based Gauge.) It may also be necessary to gather more information on responsibilities, skills and knowledge than is contained in the job description and person specification; for example, a job description may describe budgetary responsibilities, but not the scale of these.

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[1] The fact that the pro-forma includes some factors but not others should not be interpreted as meaning that those included are more significant – the proforma is intended purely to assist in gathering information about jobs.

5.2     Like job evaluation, job matching involves people making judgements. It is therefore important to have rules and mechanisms in place locally that ensure these judgements are informed, structured and consistent. **Appendix 3** is a guide to aligning job descriptions, person specifications, organisational charts and other relevant documentation to profiles.

5.3     It is critical that panels have up to date and accurate information in order to carry out this process effectively. It is imperative to have an audit trail of how and why jobs have been matched to profiles. It is important to record why a job matches to a profile and use of a matching form to explain the rationale is recommended. A sample form is attached as **Appendix 4**, but panels may decide to draw up their own matching form, possibly by copying the chosen NJC profile and customising this into a checklist. Matching forms should have a reason for each factor assessment and also set out any other information that has been considered, not included in the profile.

5.4     It is not essential to have a complete matching of job factor levels to all profile factor levels. A small number of variations is acceptable (see step 4 tips, **Appendix 3**). The matching rules will need to be agreed locally. If a job does not match to a profile, it will require a separate evaluation.

5.5     The full set of national profiles may not necessarily be used, as according to the structure of the organisation, not all may be appropriate.

## 6.     Web-Based Gauge

6.1     For those organisations wishing to use the web Gauge software supplied by Pilat (now owned by Magic Software: https://www.magicsoftware.com/group-offering) to evaluate NJC profiles, the profiles will be loaded to an individual organisation's web-Gauge site.

6.2     Pilat recommends that the profile is downloaded and, as a desk exercise, the local job is re-evaluated using the profile as guidance. There is then an opportunity to slightly alter the question path depending on local circumstance and local conventions. A note can then be added to the evaluated job to justify any changes made.

6.3     Pilat has added the School Support Staff Profiles to the web-based Gauge software so that evaluations can be added directly (without using the question and answer process) using the profiles as templates for an evaluation. For each factor, different levels can be chosen and these levels will then be reflected in the Job Overview.

6.4     Should organisations wish to have all the national profiles added   (on a similar basis to the School Support Staff Profiles), Pilat would be willing to discuss these additions on a one to one basis.

6.5     Please contact Denis Crowe at Pilat if you would like to discuss this option (dcrowe@pilat.com).

## LIST OF NATIONAL PROFILES

### Commissioning

- Commissioning Support Assistant
- Commissioning Support Officer
- Commissioning Officer
- Senior Commissioning Officer
- Commissioning Manager

### Craft Workers[2]

### Newly Qualified, Experienced and Chargehand Families

- Electrician
- Glazier
- Joiner/Carpenter
- Labourer
- Labourer/Driver
- Mechanical/Vehicle Fitter
- Painter Decorator
- Paviour
- Plasterer
- Plumber
- Plumber Heating Engineer
- Roofer
- Bricklayer
- Team Leader

### Family Support Worker

- Family Support Worker Entry Level
- Family Support Worker
- Family Support Worker Higher Level
- Family Support Worker Team Leader

### Home Care Worker

- Home Care Worker Entry Level
- Home Care Worker
- Home Care Worker Team Leader

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[2] NB: The Craftworker profiles were issued by the LGA as their use is not endorsed by UNITE (nor UCATT).

**Public Health**

- Commissioning Manager
- Director of Public Health
- Health Improvement Practitioner Advanced
- Health Improvement Practitioner Specialist
- Health Improvement Principal
- Information Analyst
- Information Analyst Advanced
- Information Analyst Principal
- Information Analyst Specialist
- Information Technician
- Public Health Consultant
- Public Health Researcher
- Public Health Research and Development Manager
- Information Analyst
- Communications Manager
- Director of Public Health

**Residential Care Worker**

- Residential Social Care Officer
- Residential Social Care Officer Higher Level

**School Support Staff**

**Administrative and Management Job Family**

- Administration 1-4
- Business Management 1-3
- Examination 1-2
- Examination Invigilation
- Finance 1-4

**Facilities Job Family**

- Catering 1-5
- Premises 1-6

**Pupil Support and Welfare Job Family**

- Behaviour Management
- Learning mentor 1-3
- Midday Supervision 1-3
- Pupil Wellbeing Management
- School Attendance and Family Support 1-2

**Specialist and Technical Job Family**

- ICT Support 1-3
- Library/Resource Centre 1-3
- Technician 1-4

**Teaching and Learning Support Job Family**

- Teaching Assistant 1-5
- Additional Needs Support Assistant 1-3
- Cover Supervision
- Early Years 1-5

**Social Work**

**Generic**

- Assistant Team Manager
- Senior Social Worker 1
- Senior Social Worker 2
- Social Work Assistant/Support Worker
- Social Work Assistant/Support Worker Higher Level
- Social Worker
- Social Worker Advanced/Consultant
- Social Worker Newly Qualified
- Team Manager

**Specialist**

- Social Worker, Adults
- Social Worker, Approved Mental Health Professional
- Social Worker, Child and Adolescent Mental Health Service
- Social Worker, Child Protection/Safeguarding
- Social Worker, Duty/Intake
- Social Worker, Family Placement
- Social Worker, Independent Reviewing officer
- Social Worker, Trainee
- Social Worker, Youth Offending Team/Service
- Principal Social Worker

**Support Time Recovery Worker**

- Support Time Recovery Worker Entry Level
- Support Time Recovery Worker
- Support Time Recovery Worker Higher Level

**Effort and Environment Proforma**

### 1. PHYSICAL DEMANDS

This factor measures the type, amount, continuity and frequency of the physical effort required by the job. It covers stamina as well as strength. It takes into account all forms of bodily effort, for example, that required for standing and walking, lifting and carrying, pulling and pushing. It also includes the physical demands involved in working in awkward positions, for example, bending, crouching, stretching; for sitting, standing or working in a constrained position and for maintaining the required pace of work.

**Does your job require any of the following?**

| Job requirements | Yes / No | Please give typical example(s) and, if relevant, state the weights involved or if unknown, what is done and what is involved? | Average number of times per day? | Average number of days per week? | On each occasion, how long? |
|---|---|---|---|---|---|
| 1.1 Pushing, pulling objects? | | | | | |
| 1.2 Bending, kneeling, crouching, stretching i.e. working in awkward positions? | | | | | |

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|---|---|---|---|---|---|
| 1.3 Working in a fixed, constrained or tensed position, including repetitive movements? | | | | | |
| 1.4 Standing/Walking for substantial periods of time? | | | | | |
| 1.5 Lifting and carrying objects? | | | | | |

| Job requirements | Yes / No | Please give an example(s) | Average number of times per day | Average number of days per week | On each occasion, how long? |
|---|---|---|---|---|---|
| 1.6 Controlled restraint? i.e., jobs requiring training/ certification in this | | | | | |
| 1.7 Tasks that require physical effort such as digging, building maintenance or laying paving stones and/or short bursts of running? | | | | | |
| 1.8 Lifting weights/equipment with mechanical aids? | | | | | |
| 1.9 Clearing tables? | | | | | |
| 1.10 Manoeuvring/ manipulating objects/ people? | | | | | |
| 1.11 Lifting weights/ equipment without mechanical aids? | | | | | |
| 1.12 Scrubbing tables or floor? | | | | | |
| 1.13 Running? | | | | | |

| 1.14 Other, please specify | | | | | |
|---|---|---|---|---|---|

## 2.  MENTAL DEMANDS

| This factor measures the degree and frequency of the mental concentration, alertness and attention required by the job.  It takes into account features that may make concentration more difficult.  For example, repetitive work, interruptions of the need to switch between varied tasks or activities and other forms of work related press, for instance arising from conflicting work demands.  It also takes into account the responsiveness required of the jobholder. |
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| 2.1  Concentration | | | |
| --- | --- | --- | --- |
| **Describe the duties that you undertake that require concentration.  List the most important first** | **How many times per day** | **How many days per week** | **How long for each occurrence** |
| | | | |

| **2.2 Interruptions** |
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| **If you are interrupted in the course of your work, describe the nature of the interruption and say whether you have to stop what you are doing to respond to the interruption, how long the interruption last for and whether you have to re--prioritise your work as a result of it.** |
| |

### 3. EMOTIONAL DEMANDS.

**This factor measure the nature and frequency of the emotional demands on the jobholder arising from contacts or work with other people. It takes into account the situation in which the contacts or work with other people occur. For example, whether they are angry or difficult, upset or unwell or whether their circumstances are such as to cause stress to the jobholder. For example, if the people concerned are terminally ill, very frail, at risk of abuse, homeless or disadvantaged in some other way.**

| Example | Yes /No | No of occasions per day/week/ month/year | How long for each occurrence e.g. 10 minutes | Please describe the nature of the involvement |
|---|---|---|---|---|
| 3.1 Providing a service for distressed/angry people | | | | |
| 3.2 Giving unwelcome news to people | | | | |
| 3.3 Dealing with difficult situations/circumstances/behaviour | | | | |
| 3.4 Caring for people | | | | |

| | | | | |
|---|---|---|---|---|
| 3.5 Dealing with people presenting with significant emotional demands e.g. those arising from dealing with those who are frail or have physical or mental impairments or are serious disadvantaged through homelessness or in financial crises | | | | |
| 3.6 Dealing with people presenting with intense emotional demands e.g. those arising from dealing with terminally ill clients, cases of child abuse or where the necessary actions of the jobholder may cause genuine distress to or be in conflict with the wishes of the client (for example, transfer from own home to residential care, removal of child to foster care). | | | | |
| 3.7 Other, please specify | | | | |

## 4.    WORKING CONDITIONS

This factor measures exposure to disagreeable, unpleasant, uncomfortable or hazardous working conditions arising from the environment or from work with people.  It covers the frequency, duration and nature of conditions.  The factor measures those

| Does the job expose the jobholder to any of the following? | Yes / No | Please describe the requirement | Are there ways the exposure can be controlled and, if so, how? | Frequency per day/week/month/year on | How long is the exposure e.g. 10 |
|---|---|---|---|---|---|
| 4.1 Outdoor working | | | | | |
| 4.2 Aggressive verbal/physical behaviour | | | | | |
| 4.3 Unpleasant working conditions other than 'normal office' conditions where temperature , light, dirt, odour, noise or safety conform with health and safety standards | | | | | |

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|---|---|---|---|---|
| 4.4  Very unpleasant working conditions where temperature, light, dirt, odour, noise and hazards are significantly worse than 'normal office conditions' and the jobholder has no control over these, but has to work in these, for example, working in excessive heat or cold, in freezing conditions, working with pneumatic drills, working on scaffolding, working in | | | | |
| 4.5 Other, please specify | | | | |

**MATCHING GUIDE**                                                    **Appendix 3**

**The following 5-step process is recommended for aligning jobs to an NJC or other scheme model profile**

| Steps | Action |
|-------|--------|
| 1 | Identify the appropriate job family  into which the role falls<br>Identify the job titles that are most likely to align with the job – for example Classroom and Teaching Assistants would identify the five Teaching Assistant profiles; an electrician, the set of electrician profiles |
| 2 | Read the job description and selected role profiles pages first to identify not more than two realistic options, so for example if the job does not require supervisory responsibility eliminate those profiles which have this responsibility.<br>Select one profile to start aligning the job.  It does not matter which, as the other can be used later if the first turns out not to be the best match. |
| 3 | Based on the job content, identify whether there is an indicative   match based on the purpose and the key duties of the role as identified in the job statement set out in the role profile.<br>Check off key duties against the job description: all should feature, although they could be described differently.<br>If insufficient key duties align, try a second possible profile and repeat the process.<br>Check off additional duties: tick those which apply to the job and add any others which apply but are not in the profile; in the case of the latter consider whether these defeat the match<br><br>***Step 3 Tips***<br><br>• *The first stage of matching should be made based on job content (i.e. the duties of the role) as outlined above, <span style="color:red">followed by the second stage</span> using a factor-by-factor review at Step 4.  It is important that these are treated as **two** separate processes. **Both** processes must be undertaken.*<br>• *Check that all of the key duties in the model role profile are substantially the same as those of the job that is being considered*<br>• *Matching should be based on the substance of the job, not on a line-by-line basis.  Tick through each of the duties listed.  Some job descriptions might have many more duties than are shown in the model role profiles because these are genericised as a single duty in the model role profiles.  Conversely duties listed in the model role profiles might not be explicit in the job descriptions because they are assumed rather than stated.  This does not mean that the job does not match to the profile*<br>• *It is important to consider differences in language used which might result in duties appearing to differ, when they are, in fact, the same* |
| 4 | Factor matching<br>• Work through factor by factor<br>• Tick the factor evaluation statements which apply to the job<br>The necessary information may not be on the job description or person specification e.g. working conditions and physical demands are rarely described in this documentation.  If in doubt use the effort and environment proforma, Appendix 2. |

|   | If in doubt panels should seek additional information from the jobholder/line manager by way of a short questionnaire or interview if necessary<br>Where there is a range of factor levels, the matching panel should decide which level is correct.<br><br>***Step 4 Tips***<br><br>*The job can still be considered a match to the profile:*<br>• *if there are minor differences from the wording of the profile and/or*<br>• *where there are minor differences in the role that do not impact on the scoring* |
|---|---|
| **5** | Where scores do not align, either:<br>• repeat the process with another provisional matching to an alternative profile; or<br>• evaluate the factor or factors using evidence from the job information |

**Appendix 4**

**SAMPLE JOB MATCHING FORM**

| Job Title and Job Statement of Main Duties |
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| **Job Profile and Job Statement of Main Duties** |
| Teaching Assistant 2: To work with teachers to support teaching and learning by working with individuals or small groups of pupils under the direction of teaching staff and may be responsible for some learning activities within the overall teaching plan. |

| Factor | | Profile Statement | Job Information | Profile Factor | Job Factor Level |
| --- | --- | --- | --- | --- | --- |
| 1 | Knowledge | **Knowledge and procedures for a range of tasks:** | Supporting and leading learning activities. Requires knowledge and skills equivalent to NVQ level 2 in Supporting Teaching and Learning or have equivalent experience | 2 | |
| 2 | Mental Skills | **Judgement or creative skills, some need to interpret information and solve straightforward problems** | Resolves problems in relation to providing learning activities. May contribute to planning of activities for the session, day or week. | 2 | |
| 3 | Interpersonal & Communication Skills | **Interpersonal caring skills to meet basic welfare needs of clients; advisory, guiding, negotiating or persuasive skills** | Communicates with pupils to promote learning, including assessing the impact of the communication on recipients and adjusting approach as necessary. Exchanges information with staff, parents / carers. | 3(a) and (d) | |

| | Factor | Profile Statement | Job Information | Profile Factor Level | Job Description Factor Level |
|---|---|---|---|---|---|
| 4 | Physical Skills | **Dexterity, co-ordination or sensory skills; some demand for precision** | Setting up and use of educational equipment and / or keyboard skills | 2 | |
| 5 | Initiative & Independence | **Working from instructions, making minor decisions involving the use of initiative; problems referred to a supervisor/manager** | Works under the direction of the teacher; makes decisions about own work supporting pupils; more complex decisions referred to senior staff. | 2 | |
| 6 | Physical Demands | **Limited requirements for standing, walking, bending or stretching** | Combination of standing, sitting or walking | 1 | |
| | | **Some ongoing physical effort** | Requirement for standing for long periods and / or working in awkward positions, e.g. sitting on low chairs. | 2a | |

| | **Factor** | **Profile Statement** | **Job Information** | **Profile Factor Level** | **Job Description Factor Level** |
|---|---|---|---|---|---|
| 7 | Mental Demands | **Medium periods of concentrated sensory attention; short periods of concentrated mental attention; some work-related pressure** | Working with individuals or groups of pupils requiring mental and sensory concentration; work is regularly interrupted as part of the normal working pattern | 2 (a) (c) (d) | |
| 8 | Emotional Demands | **Occasional emotional demands** | Occasionally exposed to emotionally demanding behaviours and situations as a result of attending to pupils' personal needs and assisting with behaviour management | 2 | |
| | | **Regular emotional demands** | Demands arising from ongoing involvement with pupils with special educational needs | 3a | |

| | | | | | |
|---|---|---|---|---|---|
| 9 | **Responsibility for People Wellbeing** | **Some direct impact on the well-being of individuals or groups of people** | Implements planned learning activities as agreed with the teacher; works with individual or small groups of pupils. Under guidance from the teacher provides feedback to pupils on attainment and progress. | 2 | |
| 10 | **Responsibility for Supervision** | **Limited or no direct responsibility for other staff** | May demonstrate own duties to new or less experienced staff. | 1 | |
| 11 | **Responsibility for Financial Resources** | **Limited or no direct responsibility for financial resources** | May handle small amounts of cash e.g. for school visits | 1 | |
| 12 | **Responsibility for Physical and Information Resources** | **Handling and processing of manual or computerised information; careful use of expensive equipment** | Records confidential pupil data for pupils with whom jobholder works; responsible for the careful and safe use of equipment such as play and standard ICT equipment; | 2(a) (b) | |
| 13 | **Working Conditions** | **Some exposure to disagreeable, unpleasant or hazardous working conditions** | Some exposure to unpleasant conditions, including noise; outdoor working; verbal abuse | 2 | |