

Streamlining Role Analysis

Introduction

The process of job evaluation is generally recognised to be the most robust method of achieving grading structures which:

- a) satisfy the principle of 'equal pay for work of equal value' and*
- b) are both fair and transparent.*

Additionally, the use of an analytical scheme (such as HERA or FEDRA) helps to provide a defence against equal pay claims.

The key word here is "analytical". This type of scheme offers greater objectivity in assessment as jobs are broken down in detail and a points factor rating used for different elements of the role.

It is important, therefore, that measures taken to streamline the role analysis process do not impact on the robustness and objectivity of the HERA or FEDRA scheme. For simplicity, the remainder of this document refers to HERA, but the same points are true for FEDRA.

A unique sector-led scheme

The HERA scheme was developed with assistance from experts and consultants drawn from international human resource organisations, HE sector-based leadership organisations and Trades Unions. So it is genuinely and uniquely, a scheme developed by the HE sector for the sector.

The scheme was rigorously tested before its release. This testing and further work since has ensured that the product and its weighting system is fit-for-purpose, and the scheme is able to analyse **all** roles found in HE organisations to compare internal relativities, and where necessary, relate them accurately to their relative value with the labour market.

Streamlining – getting started

There are a number of things that may help to make the role analysis process less onerous and time consuming whilst preserving the important 'analytical' aspect of the scheme.

These include:

- Reviewing and refining your process e.g. what documentation you use, managers' involvement, consistency and comparison
- Customising ECC Online to support your role analysis and other HR processes.
- Working 'smarter' with ECC Online using the 'short cuts' within the system
- Utilising 'generic' role profiles using ECC Online
- Using ECC Online to generate objective role descriptions and person specifications

Many of these areas are interlinked, and working to implement one thing can almost automatically lead you into looking at other areas. This document contains suggestions for how you might do some of these things but is necessarily quite general in approach, for more tailored support please speak to your ECC Consultant.

Reviewing and Refining Process

Some points to consider:

<p>1. Who is involved in the process?</p>	<ul style="list-style-type: none"> • Job evaluation doesn't have to be an 'industry': look at incorporating into general HR roles • Ensure that managers understand the principles of job evaluation and its uses. • Are your TU representatives involved? If they are trained they can head off some of the grading challenges before these create unnecessary work.
<p>2. What documentation (paper or electronic) are you using to input to job evaluation?</p>	<ul style="list-style-type: none"> • Full 'Record of Evidence'? can be useful but is time consuming; try the "short" record instead. • A role outline form alongside a job description is a good option (example included in your pack) • A Job description alone (only if your JDs have a consistent format, are gender-neutral and provide good evidence for the HERA elements)
<p>3. How are you recording JE outcomes?</p>	<ul style="list-style-type: none"> • Still have a spreadsheet for recording outcomes? – look at the reports that you can run from ECC Online – avoid duplication of effort and potential for inputting errors
<p>4. Is there any 'double entry' or double handling of data?</p>	<ul style="list-style-type: none"> • Avoid individuals scoring on paper & then someone else entering into ECC Online • Allow all analysts to 'score' roles in the ECC Online system (access can be restricted)
<p>5. Are you using the ECC Online software to 'score' roles?</p>	<ul style="list-style-type: none"> • The process is more timely if everyone involved in evaluations uses the ECC Online questionnaire to do so. • Immediate 'sense checking' of the role and consistency and comparison checks can be carried out more effectively. It also ensures you avoid scoring errors. • Much easier for the authorization of role scores

	<p>N.B under the ECC Membership Rules you are infringing copyright if you are scoring roles using a spreadsheet – if this applies to you don't panic but do please talk to us. There are also data compliance issues.</p>
<p>6. Who has access to ECC Online?</p>	<ul style="list-style-type: none"> • For reasons given above it is better to widen access to anyone involved in role analysis • Access can be restricted to certain roles within the system, specific functionality and reports. • This can be set up by your System Administrator. • Utilise "User Groups" wisely, you should only need 2-3 System Administrators with full access to the system as these are the people who manage the system and how it is set up. Other user groups can be set up with varying levels of access.
<p>7. Do you have large numbers of jobs that are similar i.e. utilise similar competencies even if the focus of the job is different.</p> <p>E.G Project Managers, Administrators, Heads of Department, Co-ordinators, Advisers</p>	<ul style="list-style-type: none"> • Consider using Generic role profiles or template job descriptions. • See hints and tips for quick analysis using ECC Online – the process remains analytical, comments are noted in the system and information is easily accessible.

Customising ECC Online

This is very individual to your organisation so do please talk to us about this.

As an example, here are some things you could/should consider.

- Rename fields in ECC Online to reflect your terminology
- If you don't need all the 'default' fields that are there, either 'hide' them or rename and use to record other information (depends on field type)
- Make the completion of fields mandatory if they are important to your process. Users will not be able to save a role unless the fields are filled in.
- Use the custom fields to record any additional information that supports your process
- Consider which other processes are linked to role analysis and consider adding/using fields to support these
- Tailor the 'Role Search' screen to allow you to search for roles in the way that best suits your organisation.
- If you have a number of analysts and a number of roles to evaluate consider using the 'role status' and workflow display functionality.

Hints and Tips for working 'smarter' in ECC Online

Activity	Comments
Use automatically generated role codes rather than codes that reflect departments or other areas	Role codes cannot be changed once saved. To avoid problems when codes are entered incorrectly or if department names change use auto numbering. The system has a number of fields available for recording structure information such as departments.
Tailor the Role Search screen to show information that you want to see. (see below)	Makes it easier to find roles, distinguish between different roles and do quick searches for e.g. all officer roles in x department.

This is the standard set up for the Role Search screen

Role Code	Role Name	Current grade	Current score	Created	Date last scored
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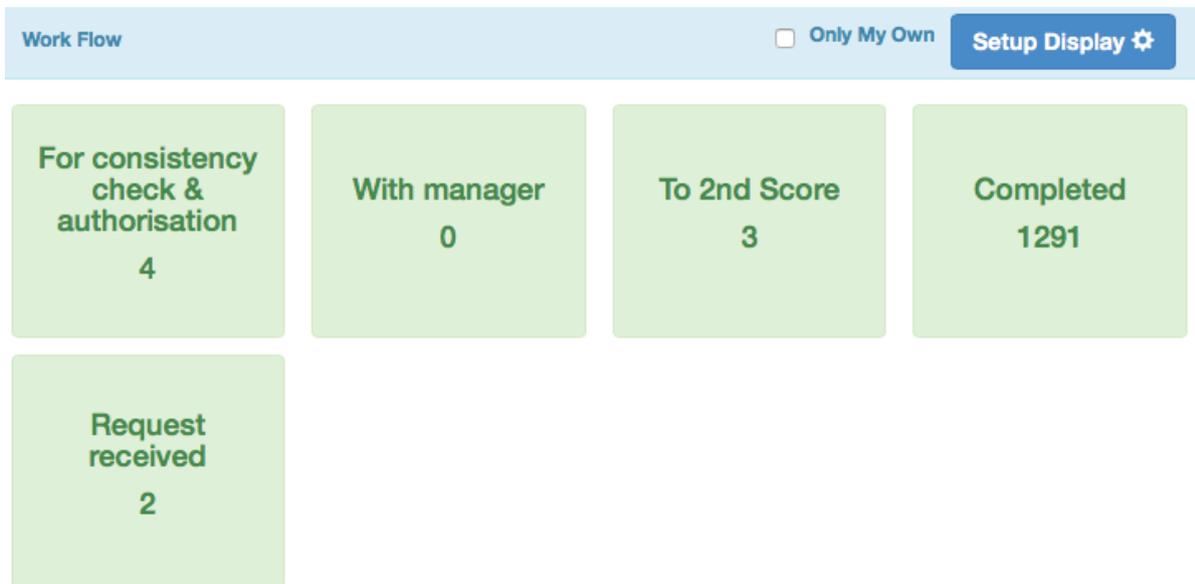
This screen shot shows another option

Role Code	Role Name	Faculty/Directorate	School/Department	Reports To Alternative	Current Grade	Date Last Scored	
0001	Executive Officer	Professional Services	Academic Division	HR Director	07	25/07/2018	
0002	Deputy Admissions Processing Unit Manager - Information, Recruitment & Admissions Office	Professional Services	Academic Division		06	10/06/2012	

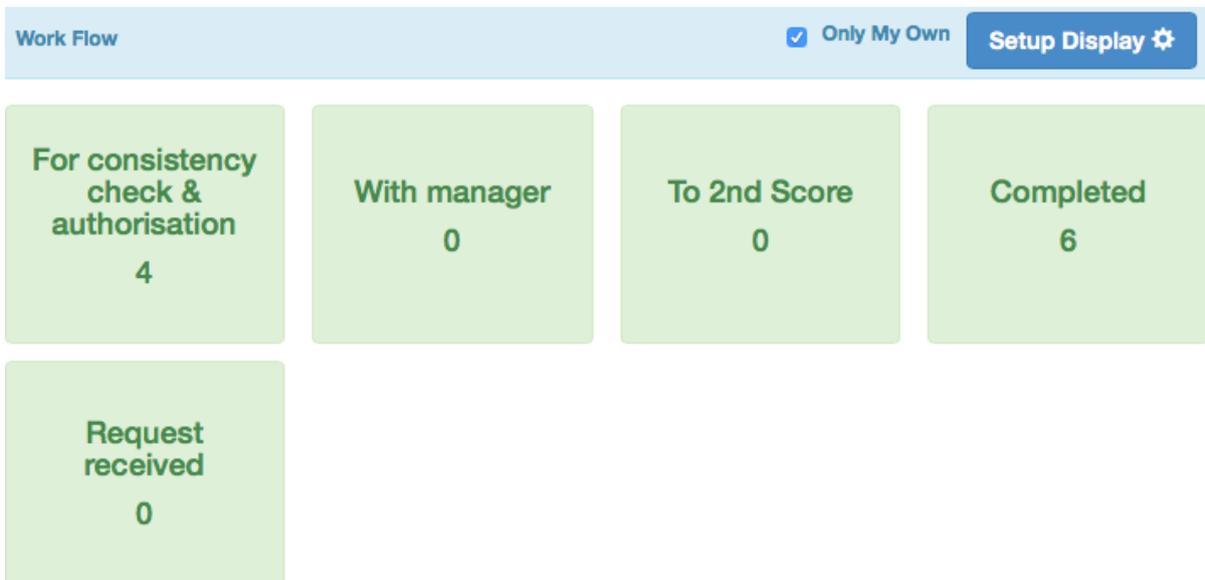
Role code and name have to be included but there are a range of other options available. Your System Administrator can change this.

Activity	Comments
Use the comments boxes in the questionnaire to explain your scoring rationale.	Enables the second 'scorer' or anyone authorising a score to understand your choice of responses. Keeps information in one place and saves on paper and time.
Copy questionnaire responses from one role to another. You can also choose to copy the comments.(see above)	If evaluating a role that is similar to the one being copied this saves time, allows you to amend responses to suit the role being evaluated and also ensures some consistency in scoring across roles.
Utilise the 'what if' functionality when looking at amendments to job descriptions or regrading requests. A new score record can be created from 'what if' scoring.	Allows a very quick rescoreing of a role, by amending the questionnaire using the 'what if' function and then creating a new score record from the 'what if' responses.
Utilise the on screen 'compare' function when scoring a role	Allows a quick comparison against up to 5 roles, to check consistency of scoring. Useful when looking at relationships between roles e.g. within a team
If you use the 'role status' functionality set up the workflow display so that you only see the relevant roles (i.e. the roles you have to deal with)	The default display for workflow is all roles in the system. By ticking the "only my own" box the view changes to just those roles where you (the user) have an action.

The screen shot below shows the default workflow display on a user Dashboard



Once the “only my own” box is ticked the display changes, showing the roles that are assigned to the user for action or that the user has completed.



By clicking on any of the boxes that have a number e.g. ‘for consistency check & authorisation’ the user is then taken to a list of those roles. (see further screen shot below).

This is a particularly useful function if you have a number of analysts or large numbers of evaluations that need tracking.

Currently showing only roles assigned to you that have the status 'For consistency check & authorisation'. [Remove filter](#)

[Search](#) [✕](#)

Use saved query: [New Query](#) [Manage Queries](#)

Show Active Only

Role Code	Role Name	Faculty/Directorate	School/Department	Reports To Alternative	Current Grade	Date Last Scored	
001338	trudy's test	Estates			05	27/10/2017	➤
001340	Trainee Test				-	-	➤
001341	IT Technician training				N/A	24/01/2018	➤
001342	Senior AV Technician				-	-	➤

Activity	Comments
Upload job descriptions and other relevant documents to ECC Online	<p>Documentation all held in one place, easy access by other users (who have been given access rights). Saves on paper, better 'version control'.</p> <p>You can have a mandatory field to prompt this – ask via contactus@ecc.ac.uk to activate this</p>
Use the reports in ECC Online	Designed to support the job evaluation process, making consistency & comparison checks easier but can also be used for metrics and feeding into management reports e.g. no of promotions, regrades, new jobs.
Use as many of the role details fields as possible.	The information from the reports is only useful if the data has been entered. The advantages of using the reports outweighs the small increase in data entry time.
Use the 'Type of Role' fields in ECC Online e.g. generic, based on generic, unique etc	If you have a large number of roles and are utilising generic profiles and matching, having this data in the ECC Online system provides an audit trail and retains the analytical aspect of the scheme that is sometimes lost by matching without recording this in your role database.

Utilising generic role profiles with ECC Online

Jobs and roles

Over the years, there has been some confusion over the meaning of “job” and “role”. The definition of what we understand as a job has changed and the concept of role has become more prominent, especially in professional and knowledge-based organisations. When ECC talks about roles it means a description of work carried out by more than one job holder that is either exactly the same or shares common characteristics.

So what do we mean by a ‘generic role profile’?

Generic role profiles are intended to provide a representative (though not exhaustive) description of the work activities typically required of a role at a given level.

So for example, the concept could be applied to administrators whose broad responsibilities are generally the same but the focus of the activity might vary depending on whichever department or function they work within.

Does the use of generic profiles and matching jobs to these profiles still meet the ‘analytical’ requirement for job evaluation?

This is what the EHRC (Equality & Human Rights Commission) have to say.

Use of job matching or slotting

An analytical job evaluation process should cover all individual jobs. However, ‘job slotting’ or matching a job to a generic job profile is acceptable practice when an individual job is identical, or almost identical, to the generic job profile.

Any generic job profiles must relate to the factor headings in the JE and matching must be undertaken against all of the factors.

For a JE exercise to comply with the standards required by the courts and tribunals, all individual jobs should be subject to an analytical JE process. A ‘slotting’ of jobs against benchmarks on the basis of historic grade relationship would not meet the standards set by the courts and tribunals, and so would not provide an employer with a defence to an equal value claim.

(Taken from the EHRC guide to gender-neutral job evaluation schemes 2014)

So, in the case of the HERA job evaluation scheme the EHRC guidance is quite clear that generic role profiles must relate to all the HERA elements and that the 'matching' process must look at all the elements.

Using ECC Online to score or match against generic profiles.

Ensure that the generic profiles have been scored and are recorded in ECC Online.

If you don't already have generic profiles talk to us about how to use ECC Online to assist in developing the profiles. There are several reports that can help with the process.

Generic role profiles should be recorded as such in the "Type of Role" field on the Role Details screen.

Roles being evaluated that are based on these generic roles should be recorded in the "Type of Role" field as "based on a generic role". Once this is selected a further field becomes visible that allows you to select the generic role that the role being evaluated is based on.

The process of scoring the role is fairly straightforward as the questionnaire responses from the generic role can be copied across and amended as necessary to reflect the 'based on' role.

There is also a report in the ECC Online system that provides information on roles linked to a particular generic role.

Matching within the ECC Online system retains the analytical aspect of the job evaluation scheme and also provides a clear audit trail showing how the job/role was evaluated.

Benchmark Roles

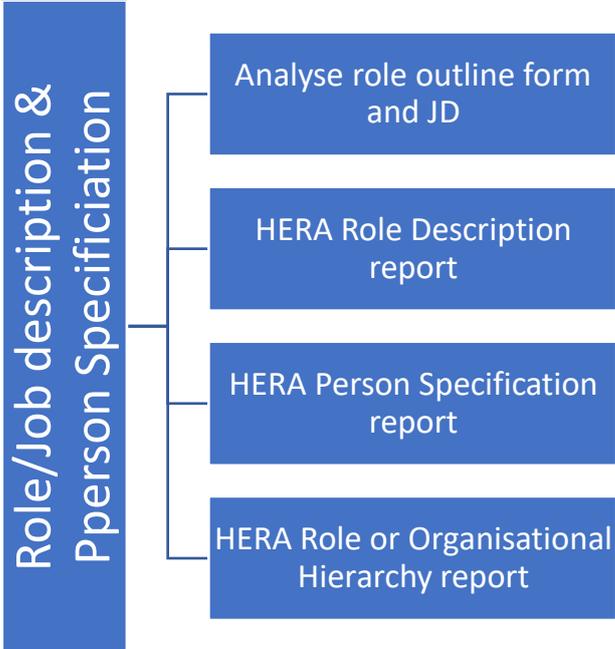
These are jobs that are used as a standard against which others are measured, because these roles are considered to be typical of a grade or group of jobs.

If you are going through the process of selecting benchmark roles it is important to ensure that the selection of benchmark jobs reflects the range of work done in the organisation as a whole.

Be wary of using benchmark roles that have a predominantly male or female staff base and ensure that any matching to benchmark roles is carried out in the same way as generic roles in an analytical and transparent manner.

Using ECC Online to generate objective role descriptions and person specifications

There are a number of reports within ECC Online that are particularly effective in supporting the production of role/job descriptions and person specifications. These are all found in the Reports section.



Role Outline Form

A role outline form covering all elements of the HERA scheme is a useful tool to supplement job descriptions. HERA elements can be grouped together to provide a shorter form that still collects the evidence required for evaluation. (examples included in the Appendix).

Role Description Report

This produces a narrative description of a role based on the responses that have been entered into the online questionnaire.

In target response or linear type questions only the 'A' and 'B' responses are used to provide the narrative. In single response and matrix questions all responses contribute to the narrative.

The report can either be downloaded as a PDF or exported to 'Word' which enables the removal of alpha responses and amendment of the narrative to include examples of activity.

Person Specification Report

This report uses the top 8 HERA elements (in terms of percentage score) and produces a narrative based on the HERA competency framework for each element, using language suitable for a person specification.

In target response or linear type questions the 'A' and 'B' responses are both used to provide the narrative. In single response and matrix questions all relevant responses contribute to the narrative.

The report can either be downloaded as a PDF or exported to 'Word' which enables the selection of fewer elements if required.

Organisational Hierarchy Report

This report shows the roles and hierarchy for a particular area of the organisation or a specific staff group e.g. technical, or grade level.

Role Hierarchy Report

This report shows the reporting lines/hierarchy for an individual role.

So how might this look?

Traditional Person Specification	HERA Competency Based Person Specification
Good time management skills	Creates realistic plans to help effectively manage own workload, prioritising work to meet deadlines and achieve personal and team objectives.
Strong team player	Works in a supporting role within a team, helping with the mentoring and inducting of new staff, and providing absence cover when needed.
Good problem solving skills	Solves and /or answers standard, predictable problems and questions from staff/students/others, in accordance with procedures and precedent.

ECC has developed a training workshop designed to help organisations review their job/role descriptions and person specifications in order to make them more objective with clearly defined role requirements.

Please look out for details of the national training event or speak to your consultant about running the training in house.