



## **Guide to the output of the job evaluation interview, the Job Overview Document (JOD)**

## Contents

<b>Topic</b>	<b>Page</b>
Introduction	3
What is Job Evaluation?	3
Steps of the Job Evaluation Process	3
The Verification Stage	4
Understanding the Job Overview Document	4
The 13 Job Factors – The Factor Framework	6
Understanding Comments on the Job Overview Document	7
Achieving Consensus on the Job Overview Document	7
Further Information	8
Appendices	
1. The 13 Job Factors	9
2. Example Letter	14
3. Job Overview Document Consensus Form	15
4. Preparation Form	16

## Introduction

As a Line Manager you will play an important role in establishing the facts about job content as part of the application of the Scottish Joint Council's Job Evaluation Scheme to the job population of the Glasgow Family.

This guide explains the role of the Line Manager and should be read in conjunction with our guide to job evaluation, which is available in the "Support for Interviews" section of our [website](#).

## What is Job Evaluation (JE)?

*The aim of job evaluation is to provide a systematic and consistent approach to defining the relative worth of jobs within a workplace, single plant or multiple site organisation. It is a process whereby jobs are placed in a rank order according to overall demands placed upon the job holder. It therefore provides a basis for a fair and orderly grading structure.*

(Extract from ACAS Booklet 'Job evaluation – an introduction')

This will be done by using the Factor Framework of the SJC JE Scheme to produce an overall score for each job which places it in a rank order of jobs within the organisation. The rank order of jobs provides the foundation for developing a new pay and grading structure. The 13 factor definitions of the Factor Framework are shown in Appendix 1.

## Steps of the Job Evaluation Process

The steps of the Job Evaluation (JE) Process are; information gathering, assessment, quality assurance, verification, and consistency checking.

**Information Gathering** - information is primarily gathered about jobs through the JE Questionnaire completed by the job holder, a job holder interview with Job Analysts and any supplementary information provided by the job holder.

**Assessment** - At the end of the interview the Gauge 'Evaluator' software creates a Job Overview Document (JOD) which summarises the information gathered under the factor headings of the SJC JE Scheme. The JOD sets out the initial assessment of the nature, degree, frequency and duration of job demands under each of the 13 factor headings based on the job holder's answers to the questions generated by the software.

**Quality Assurance (QA)** - the Job Analyst Team review the JOD to ensure it reflects the information gathered; and to identify any further information needed or matters of fact needing to be clarified.

## **Verification**

After the QA stage has been completed the Job Holder, and you as their Line Manager, will be provided with a copy of the initial JOD produced from the job evaluation interview. You are required to review the JOD and then meet with the Job Holder to discuss the JOD and consider whether the JOD is a fair representation of the requirements of the role or whether clarification or further discussion is required. The Job Analysts will be available to provide advice and guidance and can facilitate further discussion with both the Job Holder and the Line Manager, if required. If further discussion results in a change to the content of the JOD, the Job Holder and Line Manager will be issued with a copy of the revised JOD to consider and discuss.

## **The Verification Stage**

The Job Analyst who led the interview with the Job Holder will issue a copy of the Job Overview Document (JOD) to the Job Holder for their consideration; and ask them to meet with you as their Line Manager to discuss the JOD. A copy of this correspondence will also be sent to you. An example of the letter is included in Appendix 2.

The letters will be accompanied by the “Job Overview Document Consensus Form” as set out at Appendix 3.

Line Managers will also be invited to attend a briefing to help you better understand the content of the JOD before meeting the Job Holder to discuss the JOD.

Following the briefing session you should arrange a suitable time to meet with the Job Holder to discuss the JOD. It is important to note that the Job Holder may wish to be accompanied by a Colleague or Trade Union Representative at this meeting, as a Line Manager you should facilitate this request.

## **Understanding the Job Overview Document**

To review the content of the Job Overview Document (JOD), it is helpful to understand how the JOD is constructed.

The computerised job evaluation system, Gauge+, produces a JOD as a summary of the information input during the Job Evaluation Interview. This is the key document in the evaluation process, and its purpose is to capture the outcome of the evaluation process based on agreed job content.

The initial Job Overview Document for each individual Job Holder will:

- contain analytical information about the nature, degree, frequency and duration of job demands set out under the 13 factor headings of the SJC job evaluation scheme 3<sup>rd</sup> Edition. This will include illustrative examples of the type of demand envisaged – considered to be equivalent to the demands of the job being assessed – these examples are drawn from the factor Guidance of the SJC Scheme.

The final version of the Job Overview Document for each Benchmark Job will be based on the range of information gathered across the benchmark job holders; and will include descriptive information that:

- identifies the purpose of the job, and its position in the operational hierarchy
- briefly describes the main tasks and responsibilities involved

The JOD is specifically designed to support the job evaluation process and is therefore quite different in style and content from job descriptions, person specifications and role profiles which the Council currently use.

The information set out under each of the factor headings is analytical and relates directly to the factor definitions and guidance contained in the SJC JE Scheme, as shown in Appendix 1.

The Gauge+ “Evaluator” software provides a series of questions and answer options relating to each of the 13 factors. These questions structure the discussion between the Job Analyst and the Job Holder; and are intended to elicit the information necessary to assess the demands of the job in relation to each specific factor heading. In accordance with the principles of job evaluation, the questions therefore seek to establish:

- the **nature** of the demand on the Job Holder in terms of the definition of the factor
- the **degree** of demand or the extent to which the demand is required
- the **frequency** of the demand or how often it is required
- the **duration** of the demand or for how long it has to be sustained.

A range of possible answers is provided for each question – sometimes this is a simple choice between ‘yes’ and ‘no’; sometimes there is a series of ranges, for example, ‘up to 20%’ or ‘20% to 40%’ etc; and sometimes there is a selection of descriptive sentences to choose from, such as ‘working at own pace’ or ‘working at a pre-determined rate’.

The Job Holder and Job Analyst consider the various options available to identify the answer which best characterises the demands of the job in relation to the specific factor heading.

The software only allows one answer to be chosen, and the Job Holder and Job Analyst need to carefully consider the demand of the job, as specified in the factor definitions, to identify the most appropriate answer.

The Gauge+ 'Evaluator' software summarises the information provided under each factor heading by replicating key elements from:

- the questions asked
- the answers selected
- the examples provided in the "Evaluator" Help screens drawn from the factor guidance.

The SJC Job Evaluation Scheme and the supporting software, are designed to encapsulate the full range of job content within the Council's job population and reflect the diversity of the nature of the work undertaken; therefore the language of the Scheme and of the question and answers have to be fairly broad and generic.

The paragraphs generated by the software may not be particularly elegant in their construction, but they summarise the route through the available answers to each question and the answer chosen by the Job Holder with the help of the Job Analyst.

The Factor Framework was designed to capture the range of job demands found across the entire job population of a Scottish local authority, with that in mind, please note that some of the examples may not necessarily seem appropriate to the job as described in the JOD. For example, in the Concentration Factor, there may be mention of chainsaws. (The Job Holder might not use a chainsaw but may carry out a comparable activity/task that require the same degree of concentration). In this Factor consideration is given to the nature, degree and duration of concentration required to do the job on a day-to-day basis.

## The 13 Factors – The Factor Framework

The definitions of the 13 Factors of the SJC JE Scheme 3<sup>rd</sup> Edition are detailed in Appendix 1.

You should refer to these factor definitions when considering the factor statements set out in the JOD – you may find it helpful to make notes on the 'Preparation Proforma', as shown in Appendix 4, of anything that you consider needs to be discussed with the Job Holder.

There is space on the Preparation Proforma to note:

- any aspect of the role as it is undertaken by the individual Job Holder that appears to have been omitted from the JOD
- anything in the JOD that appears not to be relevant to the role as it is undertaken by the individual Job Holder
- anything that appears not to fully reflect an aspect of the role as it is undertaken by the individual Job Holder

- anything that appears to reflect aspects of your own role, or the role(s) of the individual Job Holder's sub-ordinates or colleagues

## Understanding Comments on the Job Overview Document

When reviewing the Job Overview Document (JOD) you may see comments detailed below the paragraph for a particular factor statement.

These comments have been input to the Gauge+ 'Evaluator' software by the Job Analyst leading the interview and this may have been done to highlight that clarifying information is required (such as current qualification requirements) or to explain why a particular answer is appropriate although it might not appear so (such as a reference to 'chainsaws' in an administrative role). Particular attention should be paid to these comments as they are an indication that the Job Holder and Job Analyst may have had some discussion or difficulty in selecting the most appropriate answer from those available.

When you as a Line Manager and Job Holders discuss the JOD, you should seek to reach a consensus that the comments provided do accurately reflect the demands of the role.

You should note any comments that you consider require discussion with the Job Holder, or with the Job Analysts, on the Preparation Proforma

## Achieving Consensus on the Job Overview Document

Following the review of the Job Overview Document (JOD) by you and the Job Holder, if you both agree that the JOD is an accurate reflection of the demands of the Job Holder's role as undertaken by the individual, then complete Part A of the Job Overview Consensus Form (as shown in appendix 3) and return it to the Job Analyst Team as per the instruction in the correspondence received (example as shown in appendix 2).

Following review of the JOD, if you and the Job Holder consider that amendments are required to better reflect the demands of the role then you should contact the Senior Job Analyst who conducted the Job Holder interview, to discuss the matter further. This discussion may require a meeting of all parties to reach a consensus and agree any revisions required to the JOD. The Job Holder may wish to be accompanied in any such discussion by a colleague or their Trade Union representative.

Where these discussions result in no consensus being achieved, Part B of the Job Overview Consensus Form (as shown in appendix 2) should be completed and returned to the Job Analyst Team.

In the event that consensus is not achieved, the views of the parties will be noted and Service management will be required to support the Job Analyst in finalising the content of the Job Overview Document.

## Further Information

Information about the SJC Job Evaluation Scheme is available on our [Website](#). If you have a specific question about one of your team member's Job Overview Document, you should contact the Senior Job Analyst who conducted the Job Evaluation Interview. You will have their contact details in the Job Evaluation Interview invite email.



## Appendix 1 – The 13 Factors Definitions

### **FACTOR 1 - WORKING ENVIRONMENT**

**This factor considers the physical environment in which the job is carried out.**

It covers exposure to disagreeable, unpleasant, uncomfortable or hazardous working conditions such as dust, dirt, temperature extremes and variations, humidity, noise, vibration, fumes and smells, human or animal waste, steam, smoke, grease or oil, inclement weather; and discomfort arising from the requirement to wear protective clothing.

The factor also considers hazardous aspects of the working environment which are unavoidable and integral to the job, such as the risk of illness or injury arising from exposure to diseases, toxic substances, machinery, lone working or work locations. Health and safety regulations and requirements are assumed to be met by both the employer and the employee.

The factor takes into account the nature and degree of unpleasantness or discomfort, the frequency and duration of exposure to particular conditions in the course of normal working; and the effect of variations or combinations of disagreeable conditions.

### **FACTOR 2 - PHYSICAL CO-ORDINATION**

**This factor considers the predominant demands for physical co-ordination required to do the job.**

It covers manual and finger dexterity, hand-eye co-ordination, and co-ordination of limbs and/or senses required in the course of normal working.

The factor takes into account the nature and degree of co-ordination required, and any need for speed or precision in undertaking the specified task.

### **FACTOR 3 - PHYSICAL EFFORT**

**This factor considers the strength and stamina required to do the job.**

It covers all forms of physical effort required in the course of normal working, for example, standing, walking, lifting, carrying, pulling, pushing, working in awkward positions such as bending, crouching, stretching; for sitting, standing or working in a constrained position.

The factor takes account of the **greatest** demands on the jobholder in terms of the nature and degree of physical effort required, and the other **main** demands, in terms of the frequency and duration of the physical effort required to do the job.

## **FACTOR 4 - MENTAL SKILLS**

**This factor considers the predominant thinking requirement in the job.**

It includes problem solving, options appraisal, creativity and design, innovation, imaginative and developmental skills, analytical and strategic thinking, research, planning, and the ability to conceptualise.

The factor takes into account the **predominant** nature and complexity of the mental tasks undertaken.

## **FACTOR 5 – CONCENTRATION**

**This factor considers the concentration required to do the job.**

It covers the need for mental or sensory attention, awareness and alertness, and anything which may make concentration more difficult, such as repetitive work, interruptions or the need to switch between varied tasks or activities; and other forms of work related pressure, for example, arising from simultaneous/conflicting work demands or deadlines.

The factor takes into account the nature and degree of the **highest** level of concentration required in the course of normal working, and the duration of the requirement.

## **FACTOR 6 - COMMUNICATION SKILLS**

**This factor considers the requirement for spoken and written communication in the course of normal working.**

It covers the nature of oral, sign, linguistic and written communication skills such as informing, exchanging information, listening, interviewing, persuading, advising, presenting, training, facilitating, conciliating, counselling, negotiating, and advocacy.

The factor takes into account the purpose of the communication, the sensitivity, complexity or contentiousness of the subject matter, and the nature and diversity of the intended audience.

## **FACTOR 7 - DEALING WITH RELATIONSHIPS**

**This factor considers the demands on the jobholder in terms of service delivery arising from the circumstances and/or behaviour of those he/she comes into contact with as an integral part of normal working.**

It covers the interpersonal skills needed to deal with and/or care for other people (excluding the job holder's immediate work colleagues) who are upset, unwell, difficult, angry, frail, confused, have special needs, are at risk of abuse, are terminally ill, or are disadvantaged in some way. It also considers the need to cope with abuse, aggression, the threat of violence, and/or to deal with conflict.

The factor takes account of the extent of dealing with such contacts in the course of normal working, and the frequency and duration of the contact.

### **FACTOR 8 - RESPONSIBILITY FOR EMPLOYEES**

**This factor considers the predominant responsibility of the jobholder for the supervision, co-ordination or management of employees, or equivalent others.**

It includes responsibilities for work allocation and planning, checking, evaluating and supervising the work of others; providing guidance, training and development of own team/employees, motivation and leadership; and involvement in personnel practices such as recruitment, appraisal and discipline.

The factor takes account of the nature of the responsibility, rather than the precise numbers of employees supervised, co-ordinated or managed; and the extent to which the jobholder contributes to the overall responsibility for employees.

### **FACTOR 9 - RESPONSIBILITY FOR SERVICES TO OTHERS**

**This factor considers the jobholder's predominant responsibility to others in terms of the quality and delivery of service provision.**

It covers responsibilities for the provision of physical, mental, social, economic, business and environmental services, including health and safety. This includes services to individuals or groups such as internal or external clients, service users and recipients, customers, contractors, and members of the public.

The factor takes account of the nature of the responsibility and the extent of the jobholder's impact on individuals or groups. For example, providing personal services, advice and guidance, or other forms of assistance; applying, implementing or enforcing regulations; or designing, developing, implementing and/or improving services or processes.

### **FACTOR 10 - RESPONSIBILITY FOR FINANCIAL RESOURCES**

**This factor considers the jobholder's predominant responsibility for financial resources.**

It covers responsibility for cash, vouchers, cheques, debits and credits, invoices, and responsibility for the range of budgetary activities - including project, expenditure and income budgets, income generation and the generation of savings, assessments of risk/grants, loans/investments.

It takes into account the nature of the responsibility, for example, accuracy, processing, checking, safekeeping, security, authorising, monitoring, accounting, auditing, budgeting, estimating, business and financial planning, control and long term development of financial resources. It also takes into account the need to ensure economy, efficiency and effectiveness in the use of financial resources, and the need to ensure financial probity.

The factor takes into account the extent to which the jobholder contributes to the overall responsibility, rather than just the value of the financial resources.

## **FACTOR 11 - RESPONSIBILITY FOR PHYSICAL AND INFORMATION RESOURCES**

**This factor considers the jobholder's primary and secondary responsibilities for the Council's physical and information resources.**

It covers tools, equipment, instruments, vehicles, plant and machinery, materials, goods, produce, stocks and supplies, paper based or electronic information used in the course of normal working. It also covers responsibility for offices, buildings, fixtures and fittings; Council databases, information systems and records; land and construction works.

It takes into account the nature of the jobholder's primary responsibility for resources and any secondary responsibility, for example, safekeeping, confidentiality and security; deployment and control; maintenance and repair; requisition and purchasing; planning, organising, or design and long term development of physical or information resources.

The factor takes into account the degree to which the jobholder contributes to the overall responsibility, and the value of the resource.

## **FACTOR 12 - INITIATIVE AND INDEPENDENCE**

**This factor considers the jobholder's scope to exercise initiative and the extent to which they have freedom to act.**

It takes into account the nature and degree of supervision and guidance of the jobholder provided by instructions, procedures, practices, checks, policy, precedent, regulation, strategy and statute.

## **FACTOR 13 – KNOWLEDGE**

**This factor considers what the jobholder needs to know to do the job.**

It covers all practical, procedural, technical, specialist, policy and organisational knowledge required for the job, including knowledge of equipment and machinery, numeracy and literacy, culture and techniques, ideas, theories and concepts necessary to do the job.

It takes into account the breadth, and complexity of knowledge required, and the depth of understanding needed. It considers the **minimum** qualifications or experience which will **typically be needed** to do the job, but does not take into account qualifications specified as a recruitment criteria to fill the post. These

minimum qualifications and experience will therefore **not necessarily** be those held by any individual jobholder.

## Appendix 2 – Example Letter



**Chief Executive**  
**Annemarie O'Donnell**  
**LLB DipLP**

Corporate Human Resources  
Chief Executive's Department  
Glasgow City Council  
City Chambers  
George Square  
Glasgow G2 1DU

**Hand Deliveries to:**  
**Reception, 40 John Street**

Date: <DATE>  
Our Ref: <REF>  
Your Ref:

### **Private & Confidential**

<NAME>  
<ADDRESS>  
<POSTCODE>

Dear <NAME>,

### **Job Evaluation – Initial Job Overview Document - <JOB TITLE>**

Following your participation in a Job Evaluation Interview, I now enclose the initial Job Overview Document (JOD) produced by the Gauge+ 'Evaluator' software for your consideration. I would ask you to meet with your Line Manager, <NAME> to discuss the content. A colleague or trade union representative can accompany you to this meeting if you wish.

When considering the document, please remember that the content is computer generated and therefore we cannot change individual words or phrases. Similarly, although the examples given may not relate particularly well to your job, we are unable to change these as they were designed to embrace the wide variety of jobs covered by the SJC Job Evaluation Scheme 3<sup>rd</sup> Edition. However, we can use the 'comments' facility to include any clarifying information that you think may be required.

If you and your Line Manager agree that the content of the initial Job Overview Document reflects the demands of the job as undertaken by you, then both you and your Line Manager should sign Part A of the enclosed form. However, if you both agree that amendments need to be made, then please contact me to discuss any proposed changes. You should then record the agreed amendments on Part B and both you and your line manager should sign it.

Please complete and return the form by <DATE>. If it will not be possible to meet the return date, then please let me know at the earliest opportunity.

Your sincerely

## Appendix 3 – Job Overview Document Consensus Form



<b>To:</b>	<b>Job Evaluation Team</b>
<b>From:</b>	<b>&lt;JOB HOLDER NAME&gt;</b>
<b>Job Reference</b>	<b>&lt;EVALUATION NUMBER?&gt;</b>
<b>Job Title</b>	<b>&lt;ACCEPTED POSITION TITLE&gt;</b>
<b>Service and Section</b>	<b>&lt;SERVICE AND SECTION&gt;</b>
<b>Line Manager's Job Title</b>	<b>&lt;LINE MANAGE JOB TITLE&gt;</b>

<b>Part A</b>	
<i>We return the initial Job Overview Document the contents of which we agreed reflect the role as undertaken by the individual Job Holder.</i>	
Jobholder's Signature:	
Line Manager's Signature:	
Date:	

<b>Part B</b>	
We consider that the following amendments are required to the initial Job Overview Document <i>We have discussed and agreed these amendments with the Analyst who conducted the original evaluation.</i>	
Jobholder's Signature:	
Line Manager's Signature:	
Date:	

## Appendix 4 – Preparation Form



### Job Evaluation: Job Overview Document Discussion Preparation Notes

<b>Evaluation Reference No.:</b>	
<b>Post Title:</b>	
<b>Job Holder:</b>	

**Note:** these notes are to assist in the discussion of the Job Overview Document between the job holder and line manager and do not form part of the Job Evaluation

#### Notes for Job Overview Document Discussion:

<b>Factor 1: Working Environment:</b>
<b>Factor 2: Physical Co-ordination:</b>
<b>Factor 3: Physical Effort:</b>
<b>Factor 4: Mental Skills:</b>
<b>Factor 5: Concentration:</b>

Continues over leaf...

<b>Factor 6: Communication Skills:</b>
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**Factor 7: Dealing With Relationships:**

**Factor 8: Responsibility For Employees:**

**Factor 9: Responsibility For Services To Others:**

**Factor 10: Responsibility for Financial Resources:**

**Factor 11: Responsibility for Physical and Information Resources:**

**Factor 12: Initiative And Independence:**

**Factor 13: Knowledge:**

**Any other relevant information:**