



Feidhmeannacht na Seirbhíse Sláinte
Health Service Executive

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HSE HR Circular 22/2008

**To: All National Directors, HSE
All Asst. National Directors, HSE
All Network Managers, HSE
All Local Health Managers, HSE**

17th September 2008

Re: New Job Evaluation Scheme

Dear Colleague,

A new job evaluation scheme for all employees in clerical/administrative grades 3-6 and analogous grades in the health service has been agreed with IMPACT. The new scheme modernises the Clerical and Administrative Job Evaluation Scheme which had existed in the health services since 1971.

The new scheme reflects revised structures within health services, with less emphasis on supervision and greater emphasis on leadership and teamwork. The revised scheme retains the analytical approach, adopting factor definitions that are used in other job evaluation schemes, with greater emphasis placed on competency based factors. The scheme also accommodates technical posts in the clerical and administrative stream that have a very high skill level (which may have associated qualifications) and that may work single handedly or in small teams. Account is also taken of the requirement to accommodate clerical and administrative posts with high levels of specific knowledge that may not have associated formal qualifications.

Documentation

Details of the scheme and the supporting documentation are attached to this Circular.

The scheme is administered in the Human Resources Directorate. You should contact your relevant area representative, details as follows:

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It is important that you bring the detail of this scheme to all relevant staff in your area and be advised that this scheme and documentation is on foot of a National Agreement. Therefore all areas should commit to its implementation.

Yours sincerely,



Sean McGrath

National Director of Human Resources

Guidelines on the procedure in applying for Job Evaluation Under the Clerical/ Administrative grades 3 to 6 and analogous grades

These guidelines for applicants, line managers and HR Departments should be read in conjunction with the Brochure on Job Evaluation.

Introduction

Job Evaluation is a scientific exercise designed to measure whether or not a post is correctly graded. It does not assess the capabilities of the person performing the duties. Hence in submitting an application all details cited must relate to the post (not the post holder). For example you must set out the educational qualifications of the post/grade and not the educational qualifications of the post holder.

In submitting an application for job evaluation, management, unions and post holder all agree to abide by the decisions of the Job Evaluation Board and any canvassing by or on behalf of a post holder will result in the disqualification of that post holder and their exclusion from the process.

Criteria for Access to the Scheme

- 1.1 Employees in clerical/administrative posts graded 3 to 6 and analogous grades can apply to have their posts evaluated.
- 1.2 Analogous for the purpose of the scheme, means that the work of the analogous grade has to be comparable to the clerical administrative grades. Where it is unclear whether a post is analogous to the clerical/administrative grades, clarification should be sought from the National Job Evaluation Board.
- 1.3 A post must be two years in existence before the post can be evaluated.
- 1.4 If there are compelling service reasons for evaluating a specific post, which is less than two years in existence, then the post holder must have the agreement of his / her line manager and the HR department in order to submit the post for evaluation. As part of this process the HR department in conjunction with the line manager, will have to make a business case for the departure from the 2-year rule to the National Job Evaluation Board. The Board will then decide whether the post will be evaluated.
- 1.5 Once a post has been evaluated it cannot be re-evaluated for two years.

Procedure for Post holders Applying for Job Evaluation

- 2.1 Applications for evaluation should be made on the National Job Evaluation Form, available from your HR department. A checklist for applicants is also available.
- 2.2 When completing the application form, applicants are reminded that job evaluation is concerned with job content, it is not concerned with the performance or particular skills of the individual postholder.
- 2.3 When completing the form, post holders should:
 - ❖ Detail the duties of the substantive post only (exclude acting up duties, or any other duties that are additional to the post).
 - ❖ Concentrate on the job you are required to do and not on yourself or your own attributes.
 - ❖ Describe the role, as it is currently, not in terms of what it will be, should or could be.
 - ❖ Concentrate on the typical job requirements, not one-off or rare events.
 - ❖ Give supporting evidence and examples where possible.
- 2.4 The completed form should be submitted to the line manager for validation. The line manager for the purpose of this scheme, must be at least 2/3 grades higher than the applicant post holder for job evaluation and not lower than a grade VI.
- 2.5 The signed evaluation form, must then be forwarded to the Human Resource Department /Section, who must also sign the form and forward specific information itemised at Section 4 below.
- 2.6 If additional information is given after the completion of the form, the line manager will be asked to validate this information.
- 2.7 If there is a decision not to process the application, the applicant post holder may refer the matter under the Grievance Procedure for the Health Service.

Line Manager Role in Processing a Job Evaluation Request

3.1 On receipt of an application for job evaluation, the line manager should ensure:

- ❖ The applicant post holder has read and understood the information booklet on the scheme and that the form is fully completed.
- ❖ That the applicant is aware that the outcome of the evaluation is not subject to appeal, unless it is an appeal of the procedures, Section 6.6 below.

3.2 The line manager must validate the contents of the application ensuring that:

- ❖ The duties set out by the applicant are the substantive duties of the post only (i.e. does not include acting up duties, or any other duties that are additional to the post).
- ❖ That the educational qualifications are the requirements of the post (and not the educational qualifications of the post holder).

3.3 The line manager will also be required to:

- ❖ Give an overview of the relevant section/department where the post resides including the reporting relationship of the post.
- ❖ Validate supplementary information that may be given by a post holder at interview.

Procedure for HR Departments /Section

- 4.1 On receipt of an application for evaluation the HR department in conjunction with the line manager (this may be the other way around) should consider whether an application for the upgrading of a post is to be addressed through:
- ❖ A service plan and whether a business case can be made for the upgrading of the post, rather than processing the application through the job evaluation scheme.
 - ❖ Whether restructuring of the service is expected within 12 months of application.
 - ❖ Whether posts at equivalent grade to the post held by the applicant post requesting evaluation (with equivalent levels of responsibility and in the same work area) have been evaluated in the past two years.
 - ❖ Whether positions at more senior level in the same work area are to be filled by way of normal appointment process authorised to take place within 12 months.

The above issues should be considered in light of the services, budgetary and employment control directives.

The HR department should then consider whether to continue to process the application through the job evaluation scheme or their normal business/service processing.

- 4.2 On receipt of a request for evaluation the HR department must:
- ❖ Verify the educational qualifications for the post
 - ❖ Sign the application form
 - ❖ Forward the following with the application:
 1. An organisational chart.
 2. Diagram/chart of the post's reporting relationships.
 3. Authorised job description of the post (if available).
 4. Details of the financial authorisation of the post (if applicable).

Time frames

- 4.3 If the post is accepted for evaluation, the HR department/section will forward the application to the National Job Evaluation Section for processing.
- 4.4 HR department/section should notify the applicant post holder, within 28 days of receipt of the application, whether the application has been accepted for evaluation.
- 4.5 The post holder may refer a decision not to process the application for evaluation under the ***Grievance Procedure for the Health Service***.

Job Evaluation – The Process

- 5.1 The National Job Evaluation Section will in due course arrange an interview with the post holder via the HR Department.
- 5.2 Two trained evaluators will carry out an interview with the post holder. This interview is not an assessment of the post holder or their performance; it is an interview to score the post under specific criteria.
- 5.3 The National Job Evaluation Section will notify the results of the evaluation to the HR department/section. This notification will also incorporate feedback on posts, which do not warrant an upgrade. Applicants are reminded that this feedback relates to the post and not the competencies of the post holder.

Outcome of Job Evaluation

- 6.1 If the outcome of evaluation is to upgrade the post, agreement should be reached locally with the union on the timing and notification to the post holder. Such notification should take place no later than 14 days of the notification, from the Evaluation Section.
- 6.2 Agreement is also to be reached with each employer on standard norms in respect of the consequences of a successful evaluation. These norms will deal with the following issues:
 - ❖ Whether the upgraded post is advertised, assigned or designated to the incumbent.
 - ❖ The implementation date for upgrading.
- 6.3 In order to protect the integrity of the operation of the Scheme, information on the marking system will be subject to Freedom of Information legislation as appropriate.
- 6.4 Where it is alleged that procedures have not been complied with, a review of the procedures can take place by two evaluators unconnected with the original job evaluation. Such a review will not extend to an examination of the rationale for the scoring of posts. The judgement of the Evaluation Team in scoring posts is not open to appeal other than where it is claimed that procedural issues associated with the evaluation have not been complied with. In such circumstances, where it is held that there have been procedural flaws relating to the particular evaluation exercise, a fresh evaluation shall be undertaken by an alternative evaluation team.

Job Evaluation Board

- 7.1 A Job Evaluation Board comprising of management and union representatives has been established under the scheme.
- 7.2 The ongoing monitoring of the job evaluation scheme will be carried out under the auspices of the National Job Evaluation Board. They will deal with any issues arising from the evaluation process.
- 7.3 The Job Evaluation Board will provide clarity on 'analogues grades'.
- 7.4 The National Job Evaluation Section will maintain a National database of decisions arising from each evaluation.

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Filling of upgraded post

An upgraded post may be filled by the following means:

- Competition (confined or open)
- Designation or Assignment

Appeals

The ratings/scoring achieved by any post under the job evaluation scheme is not open to review and the outcome of the evaluation process is not open to appeal.

Freedom of Information

In order to protect the integrity of the operation of the Job Evaluation Scheme, information on the marking system will be subject to Freedom of Information legislation as appropriate.

Canvassing

Any canvassing by or on behalf of a post holder will result in the disqualification of that post holder and their exclusion from the process.

For applicant post holders

This brochure should be read in conjunction with the guidelines for applicants.

For HR Departments

This brochure should be read in conjunction with the guidelines for HR department and line managers.

JOB EVALUATION

**For Clerical /Administrative Grades 3 to 6
and Analogous Grades in the Health Service**

Issued by the National Job Evaluation Board

February 2008

What is job evaluation?

Job Evaluation is a systematic process for assessing whether a particular job's grade is properly matched to its duties and responsibility.

Why is a job evaluated?

Over time, the demands and responsibilities associated with a post can change. If the post holder is of the view that his/her post needs to be evaluated, they can apply for an evaluation of their job, subject to satisfying the criteria for evaluation.

Can a group of staff have joint or group evaluations?

No, each Job Evaluation is individual to that job. Each post holder must apply individually for a job evaluation.

What grades are covered by the scheme?

Grade 3 clerical administrative posts to grade 6 and analogous linked grades in the health services.

How a post is evaluated?

A post is examined and scored against set criteria under 5 key headings:

1. Professional and Technical Competence
2. Problem solving
3. Decision Making
4. Responsibility and Accountability
5. Communications

Making an application for a job evaluation:

An application form is available from your HR department along with a leaflet outlining the eligibility criteria and procedure.

The job evaluation process

You are required to complete and submit your application form to your line manager for validation, who will forward your application to your HR Department. If your application for evaluation is accepted your HR department will forward your application to the National Job Evaluation Section.

How long will it take?

The National Job Evaluation Section will notify your HR department within 28 days, whether or not the application has been accepted for evaluation.

If accepted for evaluation, an interview will be scheduled with you, the post holder as soon as possible.

What happens next?

An evaluation team will carry out an interview with the post holder. This interview is not an assessment of you or your performance; it is an interview to find out more about the job, its responsibilities and duties.

Results of job evaluation

The results of the job evaluation will be forwarded to your HR Department. If the outcome of the job evaluation is a recommendation that the post be upgraded, your employer will then begin the process of filling this higher-grade post.

Job Evaluation check list for applicants and line managers

Return this checklist to HR Department

1	Have you filled in all the sections of the application form in block capitals? (Failure to fill out all sections fully will result in the form being returned to you and a delay to processing your application).	Yes	No
2	Have you signed and dated the form?	Yes	No
3	Has your line manager signed and dated the form? (The line manager must be at least two grades higher than the post holder requesting evaluation and no lower than a grade VI).	Yes	No
4	Have you read the Procedural leaflet for applicants, and do you understand the procedure particularly in relation to Freedom of Information and Appeals.	Yes	No
5	Are you aware that canvassing by you or another person on your behalf shall result in disqualification and exclusion from the job evaluation process?	Yes	No

Signature of Applicant Post Holder -----

Signature of Line Manager -----

Grade of Line Manager -----

*Issued by the Job Evaluation Board
For the Clerical administrative grades
3-6 and analogous grades.*