

Report of Human Resources Manager

Subject: Pay & Grading Review Project

1. Purpose of this report

The purpose of this report is to:

- provide Members with a background report on the pay and grading project, to ensure that new Members are brought up to speed; and
- supply all Members with a progress update, against the original project deliverables.

2. Introduction

Members were initially provided with a report on the Pay and Grading Review in November 2021. A copy of the initial report is shown at **Appendix A**.

At the November HR Committee, Members were advised that the project would not start until sufficient progress had been made on the organisational restructure. Progress has now been made to implement the new structure and strategy, and the pay and grading project has now commenced.

The level of granularity within the report is a direct response to Member concern, based on evidence of where other organisations have mis-judged the complexity of similar projects.

3. Background summary

What are we doing?

The Authority is carrying out a 'root and branches' review of:

- 1) how all job roles are evaluated across the Authority (*moving from Hay methodology to the NJC 13 Factors job evaluation model*)*;
- 2) how roles are assimilated into the existing pay structure (*including an Equal Pay Audit*); and
- 3) the physical pay structure (*subject to Member approval*).

**A paper supporting the move from Hay to NJC 13 Factors has already been agreed by the Leadership Team and Committee.*

Why are we doing this?

Staff and Unions have been calling for a review for many years. A review was agreed prior to 2019. However, other factors intervened which meant that this work was not undertaken.

The Authority is required to periodically review its pay structure to ensure it meets key legislation such as Equal Pay. It is therefore essential that all roles are included within the scope of the project and not just those of staff who have requested a review.

In addition, there have been a number of new roles introduced within the Authority where no formal** job evaluation has been conducted, due to a lack of knowledge around Hay methodology. It is therefore essential to ensure a pay and grading structure is in place, to

provide for a pay structure that remains fair to all and is future proofed for any further changes.

***Informal evaluations have been carried out on all new roles, to ensure a level of consistency across grades as the current HR Manager is also Hay trained.*

Who is supporting the process?

PCNPA have engaged the services of West Midland Employers (WME), a specialist with experience of the NJC 13 Factor model, who also supported Brecon Beacons with their review, a number of years ago.

4. A three-phase review

There are **three** distinct phases to this project:-

- Phase one begins with Job Evaluation - where all roles across the Authority are evaluated using the NJC 13 Factor Job Evaluation Methodology.
- Phase two is distinctively separate and involves assimilating all grades into the existing pay structure and will include an Equal Pay Audit.
- Phase three will look at benchmarking salaries to determine if any revision needs to be made to the existing structure.

Phase three will be a feasibility study for approval by Members, and is wholly dependent upon where the Authority wish to position salaries relative to the market, based on affordability and budget consideration and any evidence that salary levels are impacting the Authority's ability to recruit and retain staff.

5. How will Phase One be managed?

Preparatory Work:

1. Every role within the Authority must have an up-to-date and accurate Job Description and Person Specification. These will be completed by all Line Managers and submitted to Human Resources for consistency checking.
2. Line Managers will also be required to complete a Job Evaluation Questionnaire for all roles within the Authority. This provides more detailed knowledge not contained in the Job Description and is required to enable full consideration against all of the Job Evaluation Factors. The Questionnaire will also be submitted to Human Resources for consistency checking. A copy is provided at **Appendix B** for information of Members.
3. Guidance on completing Job Descriptions, Personal Specifications and Questionnaires will be provided to managers and support will be provided by Human Resources where required. The guidance will make it an expectation that Managers get the Job Description, Person Specification and Questionnaire agreed and signed off with each member of staff. Employees will also have access to the guidance documents, to enable them to actively participate in the sign-off process.
4. Managers will be expected to ensure Job Descriptions/ PS and Questionnaires are neither over-inflated nor under-inflated and managers will be fully accountable for ensuring they are accurate and meet the needs of West Midland Employers and the Authority, to enable the evaluation process to be conducted.
5. Human Resources will feedback to the Senior Leadership Team, who will conduct a 'consistency check' to ensure accountability levels are consistent with the new organisational structure.

Provisional deadline for preparatory work: January 2023

Some meetings with Managers have already taken place, with a proportion of managers already reviewing Job Descriptions and completing Questionnaires.

Job Evaluation:

1. West Midland Employers (WME) will conduct an independent evaluation of all Job Descriptions. WME will carry out this exercise with the assistance of the Authority's HR Manager, to ensure the initial evaluation rationale is documented prior to step two of the evaluation process.
2. A PCNPA Job Evaluation Panel will be set up to provide a 'sense check' of the work conducted by WME and against the NJC 16 Factor Methodology. This panel will be representative of all functions and include a Trade Union Representative and Human Resources. Following an all-staff email requesting volunteers, a list of Panel Members is shown at **Appendix C**.
The Panel will be trained by WME who will also facilitate the evaluations. This is a demand by the Unions and is strongly supported by Committee Members and Staff Reps as highlighted in the recent Employee Forum meeting. West Midland Employers have said this part of the process is 'a none-negotiable' stating that a degree of decision making needs to be owned by the Authority and include contextual information not understood by WME. It is also essential to gain employee and trade union buy-in and involvement. A provisional only evaluation will be given to all roles.
3. A hierarchical grid will be completed of all roles evaluated and a 'check and balances' process undertaken by the Leadership Team. A comparison will be made of new vs. existing grades, to highlight those roles with a difference in grading. A final but still proposed grade will then be documented.
4. Final proposed grades will be discussed and signed-off at a confidential meeting of the Human Resources Committee.

Provisional dates for Job Evaluation by WME: February 2023

Provision dates for PCNPA Job Evaluation Panel: late February or early March 2023

6. How will Phase Two be managed?

Existing Pay Structure:

1. All Authority jobs are presently assimilated into the existing pay structure. A new NJC 13 Factor Job Evaluation Score will be assigned to all roles within the existing structure to highlight if there are any salary differences relative to the new grade.
2. An exercise will be carried out where roles will be moved up or down the existing pay structure to ensure alignment with similar grades.
3. Financial Modelling will be carried out to determine the cost of any proposed changes based on the existing pay structure.

Other considerations:

4. Analysis will be carried out and an Equal Pay Audit completed. At the same time, an Equality Impact Assessment will be completed. Adjustments within the existing structure will be recommended based on the results of the Audit.
5. Financial Modelling and analysis will be carried out on recommendations and any proposals put forward by the Trade Union side, with regards to perceived inequalities caused by grade compression and the Living (Real) Wage Wales.

6. A paper will be drafted for confidential discussion by the Human Resources Committee or NPA who will sign-off on all changes being made within the existing pay structure.

The paper presented to Members, will include full oversight of any budget implications, options for immediate or phased implementation based on affordability and any salary protection provisions for any grade subject to downward movement.

Provisional deadline for phase two: NPA 29 March 2023 or HR Committee 15 March 2023. Extraordinary Committee meetings may be necessary where project deadlines slip.

It should be noted that we have already managed the expectations of staff, by advising them that some slippage on dates is likely to occur.

7. How will Phase Three be managed?

Benchmarking:

1. Separate to the above exercise, a Salary Benchmarking exercise will be carried out to determine the 'market median' rate for roles across the Authority and if there is any need for a revised pay structure.
2. A revised pay structure will be drafted, if benchmarking suggests some roles require adjustment against the market, based on factors such as difficulty to recruit, retention rates, 'exposure if lost' etc.
3. Financial Modelling will be carried out to determine the cost of any proposed change and a cost / benefit analysis will be conducted to assess feasibility.
7. A paper will be drafted for confidential discussion by the Human Resources Committee who will debate the merits of any proposed change to the existing pay structure.

Phase three will only be necessary if initial benchmarking suggests Authority salaries are not keeping pace of the market and pressures exist to make such a change. Careful consideration will need to be given to any external benchmarking as it has the potential of opening up contentious discussions about moving from a pay model based on job size for all jobs, to a more commercial model based on market rates for all or some jobs.

8. Policy Development

Progression through scales is currently based on 'time served' and reflects neither skill or knowledge development, nor does it reflect poor or excellent performance.

A policy review will be carried out on how staff move through the scale points and whether bands should be compressed or expanded to aid further movement against market rates and whether movement through the band should be based on skills development and / or performance.

A new Pay and Grading policy will be drafted, consulted on and presented for agreement of the Human Resources Committee and/or NPA (*depending upon the extent of change*). This will also include the process and criteria for future re-evaluations and employee appeals.

As with all pay and grading reviews, the majority of staff will see no change. However, a small proportion of roles may move up or down the bands and scales. We anticipate some staff may appeal their grade and provision within the policy will be made for this.

To reduce the number of appeals, managers are expected to ensure all Job Descriptions are signed-off with members of staff. This will potentially reduce the number of appeals. However, the Pay and Grading Policy will need to provide for a robust and evidence based process for any subsequent appeals.

9. What is salary elements are included within the scope of the Review?

The below elements will be considered as part of the review:

- Basic Salary / Clean cash
- Essential Car User Allowance
- First Aid Allowance
- Pay Progression (time served, performance and skills development).
- Total remuneration (including Pension, benefits etc) for benchmarking purposes only

10. Consultation and Involvement

The key to successful management of any pay and grading project is transparency and trust in the policy, the system used and fair application.

Staff are being involved at two stages of the project - Firstly) all staff will be actively engaged by their Line Manager to ensure that Job Descriptions and Questionnaires accurately reflect the role the employee is required to carry out for the Authority, but also reflects an accurate view and sign-off by the incumbent. Secondly) a representative group of staff from each service area will be trained to support the process and evaluate all roles; ensuring that West Midland Employers have a rounded view of roles across the Authority, and internal context is provided, to ensure assumptions made by West Midland Employers are accurate.

Staff will receive regular project updates. Since the project was kicked off, two staff communications have already gone out and work is being carried out for several road shows to be delivered. It is our desire to ensure full visibility of the project and more importantly of the NJC 13F methodology used, how roles are evaluated and assimilated into the pay structure and how appeals will be considered.

All information used in the process of review will be available to staff, with the exception of confidential staff salaries and personal information about other employees.

11. Risk Considerations

Although many staff would hope that job evaluation will move them up the pay structure, reality is that jobs can move up, stay where they are or even move down. Our communications so far have attempted to manage staff expectations and will continue to do so. Staff morale will continue to be monitored throughout the project.

The Authority have engaged West Midland Employers, a specialist in Job Evaluation to provide a higher level of impartiality to the process. Supplementing this will be an internal Job Evaluation Panel, helping to provide further checks and balances. The internal Evaluation Panel also includes a member of Unison, to ensure full buy-in and acceptance of any changes.

To mitigate against the risk of perceived unfairness and bias, internal Job Evaluation Panel members will not evaluate their own posts, nor any post of family members employed by the Authority. Consideration will also be given by West Midland Employers to how managers on the Internal Job Evaluate Panel evaluate roles in their own team, to ensure they are not overinflating grades to influence their own role. Managers are and should be trusted to do

the right thing, but checks and balances will nevertheless be necessary to manage the perceptions of other staff.

Not only listening but reacting to staff feedback as a result of the restructure, we have built into the project, approvals at Member level. This will give staff further assurances around the transparency of the process and appropriate and independent scrutiny and decision making.

Financial Considerations

The cost of engaging West Midland Employers to support the evaluation of all roles across the Authority is to be £12,500 plus VAT.

A generous £250,000 contingency has been set aside for any necessary grade changes as a result of the pay and grading review.

Welsh Language Considerations

As the project is rolled out, all policy and procedures will be developed bi-lingually to comply with Section 44 of the Welsh Language (Wales) Measure 2011.

Human Rights Issues

Full consideration of the Human Rights and Equality provisions have been considered. An important factor in deciding to choose the NJC's 13 Factor Model was its compliance with Equal Pay legislation.

A Gender Equality Impact Assessment of the evaluation scheme will be carried out as part of the implementation.

Recommendation: Members are presented with this paper for information and asked to comment on its content, with reference to their involvement in the approval process.

(Further information is available from the Kelland Dickens, Human Resources Manager, on 01646 624825 – email kellandd@pembrokeshirecoast.org.uk)

Human Resources Committee – November 2021

REPORT OF HUMAN RESOURCES MANAGER

SUBJECT: GRADING REVIEW PROJECT

Purpose of this report

The purpose of this report is to provide Members with an understanding of how the Authority will undertake a review of its grading structure. This follows a request by Members of the Human Resources Committee on 15 September 2021.

Introduction

The Authority recognise that, whilst pay is only one of a number of motivating factors in promoting effective performance and job satisfaction, it represents an important yardstick by which staff perceive themselves to be valued. Through the Staff Reps Forum and Trade Union feedback, there has been a small degree of 'noise' from employees and managers about the current grading scheme. Specifically, these concerns are:

- 1) A lack of visibility regarding the grading scheme in general; and
- 2) Perceived inequalities between grades and salaries across roles.

In response, a commitment was given to staff, for an appraisal of the existing grading structure to be undertaken.

As the Authority is also going through a period of change, as it focuses on a new strategy, a review would be necessary to support any revised organisational structure.

This paper sets out, in general terms, how the Authority intends to conduct a review of its pay and grading, to ensure it remains fit for purpose today and is future proofed for tomorrow.

Background

The Authority currently use the Hay Job Evaluation methodology for grading; which maps out job roles in the context of the organisational structure. It evaluates one job relative to another and provides a systematic ranking, determined by the complexity and contribution of the job.

Evaluation was completed by Pembrokeshire County Council a number of years ago (2003), but did not include extensive internal moderation; although the grades were validated by the HR Manager at the time.

This has led to a lack of internal knowledge on the process of evaluation using Hay, which is compounded by limited internal documentation to bridge the knowledge gap.

It has also resulted in a job evaluation scheme that is not 'future proofed' for any subsequent changes to organisational structure or individual role.

Review Objectives

The overall objective of the Grading Review is to establish a simple, transparent and fair pay system for determining salary levels, linked to job role and responsibilities and that can be seen to explicitly demonstrate equity through a robust and trusted job evaluation system.

The project will:

1. Identify current practice on pay systems in similar organisations including the other National Parks.
2. Recommend an appropriate Job Evaluation model to carry out a transparent and valid evaluation of all roles across PCNPA.
3. Undertake a salary benchmarking exercise of current pay levels to determine any drift.
4. Recommend if, how and when the Authority might move its current pay structure to a revised one, where any drift is identified.
5. Implement an appropriate Pay and Grading Policy which complements and expands current arrangements utilising NJC T&Cs and the chosen job evaluation methodology.
6. Engage staff fully throughout the review and ensure a thorough Communications Plan (including Pay Strategy and Policy and Appeals Procedure) is developed, to improve staff confidence and transparency of how salary levels and bands are determined.

Considerations and Scope of the Review

The Authority remain committed to the principles of equal pay for work of equal value. In parallel to the review an audit will be carried out by sex so that the requirements of equal pay for work of equal value are met, having due regard to the Equality Act 2010.

As part of the review it should be decided if the pay structure requires a shift from where the same pay decision (cost of living and progression) applies to all staff, or whether 'Merit Pay' is considered - where managers can recognise the 'more than' expected contributions of strong performance and exemplary staff and/or consideration of marginal-performing staff; rather than merely length of service which in itself is not fully compliant with the Equality Act 2010.

Market rate comparisons will be used to determine the salary range for all jobs and/or job families. An overarching Pay Strategy will need to be agreed to determine if the PCNPA aspire to achieve the 'median' market rate for jobs within its sector or an alternative e.g. 10%ile, 20%ile, 75%ile etc.

When implementing any recommendations, The Authority may or may not have the financial resources to bring staff to a new market rate over the short term, if benchmarking identifies this. If the market data is significantly different from current, the Authority will need to determine how to bring salaries in line over the longer term.

The intention is to include all jobs from Chief Executive downwards in the review, although research has already identified that some National Parks continue to use Hay for their Chief Executive role. Guidance will be sought from the external consultants as to the best approach to be taken with Director level roles and relevant Committee Member(s) consulted accordingly.

Hay Job Evaluation

Whilst no job evaluation model is perfect, critics of the Hay job evaluation model claim it places greater emphasis on intellectual skills and financial accountability above those of practical skills.

As part of the Review, research has already been undertaken to determine the most appropriate evaluation model for the 'lion's share' of Authority jobs going forward and a paper was recently presented to the Leadership Team.

A recommendation to move away from Hay to the National Joint Council's (NJC's) 13 Factor Model was accepted.

There are a number of reasons for this decision. Specifically:

- 1) Authority employees' terms and conditions of employment are governed by the National Joint Council (NJC) and are generally well regarded by staff. Utilising the model will give credibility to the process.
- 2) Other National Parks, including Brecon Beacons, North Yorkshire Moors and Snowdonia use the NJC 13 Factor (NJC 13F) model. Wider benchmarking and learning is therefore possible.
- 3) Costs are more manageable, when faced with a potential cost of over £30,000 for Hay job evaluation alone (excluding consultancy) - which is out of reach for all but the largest employers.

Review Milestones

There are two distinct elements to any grading review. 1) the framework used for establishing the grading and 'value' of any given job; and 2) the pay structure and how jobs are mapped to it.

Progress has been made on the first count, to establish a fair methodology and framework for grading. The below table provides a high level summary of the other steps to be taken to ensure its successful implementation.

Step	Activity
1.	<i>Analysis of PCNPA's organisational structure</i> This is essential to ensure role levels are correct and clarity of purpose, responsibility, decision making and execution is set out for all roles. This will be carried out in parallel with work on reviewing the desired structure to deliver the new strategy. The exercise will furthermore help to embed the new organisational structure and 'ways of working'.
2.	<i>Role analysis</i> A process of review and documentation will be carried out for <u>all</u> Job Descriptions. Training will be provided for Line Managers to ensure Job Descriptions conform to a template that enables effective and thorough job evaluation using NJC 13F. Employees will be fully consulted when drafting Job Descriptions and asked to confirm their agreement that the Job Description is a true and accurate reflection of the accountabilities, knowledge and skills required to undertake the role. This will ensure appeals are kept to a minimum, as the starting point of any appeal is often an inadequate understanding of the role.
3.	<i>Validation of Job Descriptions</i> A validation exercise will take place to ensure Job Descriptions map accurately to the new organisational structure.
4.	<i>Job Evaluation</i> There are three approaches being considered to ensure a valid and reliable method

	<p>of job evaluation for Job Descriptions.</p> <ol style="list-style-type: none"> I. Is to train a group of managers and employee reps, to act as one or more Job Evaluation Panels. The benefit to this is that an internally appointed selection panel ‘future proofs’ the scheme, by developing skills and knowledge in-house. They can also manage any appeals. II. Is to have all roles evaluated independently by an external consultant. This is a costlier model and can have the potential of disadvantaging staff, as limited internal moderation is able to take place. Where appeals are lodged, further costs will be incurred to have roles re-examined by the external consultant(s). III. Is to adopt a hybrid approach where a selection of roles are evaluated externally to provide a reference point. An internal evaluation panel then evaluates all other posts, using the reference point to obtain parity across grades. <p>It is worth noting that external evaluation by PCC was used previously and this did <u>not</u> provide staff with reassurance on the fairness of the process. Opinion is currently divided at Leadership level, as to which approach is best suited to PCNPA.</p>
5	<p><i>Job levelling</i></p> <p>This exercise will help define hierarchies ‘across’ the Authority, so that jobs of similar value and size can be grouped accordingly. It will be used to assign all jobs a level, giving PCNPA the ability to conduct meaningful equal pay audits and slot jobs and job families into the current and final pay structure.</p>
6	<p><i>Benchmarking</i></p> <p>A salary benchmarking exercise will be undertaken to identify a salary range for all roles within PCNPA. Careful consideration will need to be given to using local and/or national benchmarking rates for none, some or potentially all roles, dependent upon our ability to recruit and retain staff.</p>
7.	<p><i>Grading Structure</i></p> <p>Once all jobs have been evaluated and levelled, a grading structure will be established, linked to the analysis for the benchmarking exercise.</p> <p>Using the existing grading and pay structure as a reference point, the revised structure will establish the:</p> <ul style="list-style-type: none"> ➤ number of grades ➤ where the grade lines should be drawn in order to give an appropriate span of pay points ➤ related pay structure <p>It will be wise to conduct this process involving Staff Representatives and a selection of leaders/managers to rigorously challenge any initial assumptions.</p>
8.	<p><i>Financial Review</i></p> <p>Overlaying the salary benchmarking data to NJC pay rates and the revised grading structure will identify if any salary drift exists. A financial review will need to be undertaken to assess the affordability of implementing any changes and whether they will be implemented in stages to manage any ‘affordability’ issues.</p> <p>As with all grading reviews, a small proportion of staff may move to a higher or even lower grade. The authority will need to carefully and sensitively consider the financial implications of ‘ring fencing’ and/or grade progression.</p> <p>It is proposed that a presentation of the findings and recommendations is presented to the Leadership Team before progressing with implementation and sign-off, which will be achieved through the relevant governance and Committee structures.</p> <p>The Financial Review will also discuss any findings and recommendations from the Equal Pay Audit conducted as part of step 7.</p>
9.	<p><i>Pay and Grading Policy and Appeals procedure</i></p>

	<p>A Pay and Grading Policy will need to be approved by Committee, once the basic principles of design have been agreed.</p> <p>The policy will need to include how employees who move to a different grade are managed.</p> <p>All reviews result in a percentage of appeals, although the aim is to implement with such rigour that limited appeals reach a formal stage. An appeals process will be agreed as part of the Pay and Grading Policy, as will the process for re-evaluation. Re-evaluation will normally only be triggered by a significant and permanent change in accountabilities.</p>
10.	<p><i>Implementation</i></p> <p>A structured plan will be drafted to ensure the sensitive process of staff communication and roll-out is handled effectively.</p>

Consultation and Involvement

Although many staff would hope that job evaluation will move them up the pay structure, reality is that jobs can move up, stay where they are or even move down.

To ensure staff feel the process of evaluation is fair, they will be actively involved in the formation of job descriptions. Furthermore, if an internal or a hybrid approach to job evaluation is chosen, one or two staff representatives will be involved in any subsequent Job Evaluation Panels.

A Communications Plan will be developed, which will include full visibility of the NJC 13F methodology, how roles are evaluated and assimilated into the pay structure and how appeals will be considered.

Risk Considerations

Committee Members already understand that Job Evaluation is a complex process and not without risk.

To mitigate any risk, the Authority have engaged West Midland Employers, a specialist in this area to assist throughout the process. It is also believed that training Authority managers on the NJC job evaluation model will help build knowledge internally to support any subsequent employee challenges or appeals.

Consultation and involvement with staff and Unions throughout the project will be essential to ensure full buy-in and acceptance of all changes.

If internal Job Evaluation Panels are chosen, no member of the group(s) should evaluate their own post, to mitigate the risk of perceived unfairness and bias.

Financial Considerations

West Midland Employers are currently providing me with costings for the three options detailed above. A self-managed scheme is likely to start from around £3,500 with a fully managed scheme costing from £16,200 upwards, based on 108 individual roles within the Authority.

Additional costs will be at a day rate of £525 plus VAT for consultancy services.

A hybrid scheme would cost from £9,500 upwards for job evaluation, plus consultancy costs for pay structure design.

Welsh Language Considerations

As the project is rolled out, all policy and procedures will be developed bi-lingually to comply with Section 44 of the Welsh Language (Wales) Measure 2011.

Human Rights Issues

Full consideration of the Human Rights and Equality provisions have been considered. An important factor in deciding to choose the NJC's 13 Factor Model was its compliance with Equal Pay legislation.

A Gender Equality Impact Assessment of the evaluation scheme will be carried out as part of the implementation.

NJC JOB DESCRIPTION QUESTIONNAIRE

JOB TITLE:

1. Knowledge

This factor measures the Knowledge required to do the job. It covers all technical, specialist, procedural and PCNPA knowledge required. For a shorthand guide to this 'measure', please see notes at the end of this questionnaire.

What kinds of knowledge is needed in order to perform this role?		
Type of knowledge	What knowledge is needed and why?	Source of knowledge
Literacy		
Numeracy		
Procedural		
Equipment		
Administrative systems		
PCNPA		
Specialist		
Welsh and other languages		
Other (please specify)		

Does the job provide advice and guidance on policies, procedures and/or external regulations / legislation either internally or external to PCNPA?

N.B. The advice and guidance provided must influence the actions of those to whom it is given beyond just imparting information.

This is not as a consultee - the role must require the job holder to have a direct contribution to policy formation or amendment of recognised Authority policies

Yes No

If yes, please provide examples in the relevant sections below to all that apply:

Type of advisory responsibility	Tick if applicable	Provide examples of the policies, procedures or regulations/legislation	Who is this advice given to?
Advice given on internal policies/ procedures			
Advice given following interpretation of policies / procedures to meet specific circumstances or problems			
Advice given on external regulations / legislation with a specific responsibility to adapt internal policies / procedures as a result and to meet operational need			
Give an example of the most significant impact the role has for policy development, including the nature and scope of the responsibility.			

Is there any requirement for the post holder to plan or organise for the future? (e.g., events, specific project planning, programmes of activities)

Yes No

What are the most significant situations/projects that require planning?

What is the timescale of the planning stage? Days / Weeks / Months / Years

What is the job holder's specific involvement?

Please provide an example of the most difficult problem the post holder will be expected to independently solve or provide solutions and list the different types of information sources they will consider reaching a solution? (e.g., legislation, policies, consultation feedback, client's specific

requirements)

Section 2 - Physical Skills/Demands

This factor measures the Physical Skills and Demands required for the job. It covers manual dexterity, hand-eye co-ordination and sensory skills. It also measures the type, amount and frequency of physical effort required by the job. It covers stamina as well as strength.

Equipment the post holder will use	Indicate Yes /No	For what % of time	For what purpose is this used
Computer Systems		N/A	
Using Computer systems to undertake data inputting where there is a requirement for speed and precision			
Read only of GIS systems or similar		N/A	
Read and plot GIS systems		N/A	
Equipment	List equipment	For what % of time	For what purpose is this used
Is the post holder required to use any equipment within the role, if yes provide a list in the next column			
Effort	Activity	Frequency	If lifting and carrying or pushing and pulling is involved, please identify the approximate weight (in kilograms)
Is the post holder required to exert any physical effort as part of their role e.g., standing beyond normal, lifting and carrying, pushing and pulling, or (significantly beyond normal) physical effort.			
Other please state			

Section 3 - Initiative and independence

This factor measures the scope allowed to the job holder to exercise initiative and take independent actions.

Please provide an example of the **most significant** type of issue the post holder will be expected to respond to and how will they do this (e.g. how much are they permitted to do without referral to a manager)

Please provide an example of a problem or situation the post holder will be required to escalate to the manager/supervisor	
Does the post holder have discretion to change any of the following?	
Local practices and working arrangements in the team	Yes <input type="checkbox"/> No <input type="checkbox"/>
Whole Service Area / Team procedures	Yes <input type="checkbox"/> No <input type="checkbox"/>
Authority Policy	Yes <input type="checkbox"/> No <input type="checkbox"/>
Please provide an example of the policies, procedures or working practices the post holder will have discretion to amend. If none, state none.	

Section 4 – Mental Demands

This factor measures the degree and frequency of the mental concentration, alertness and attention required by the job. It takes into account things which make concentration more difficult, e.g., repetitive work, interruptions or the need to alternative between tasks.

What sort of activities does the post holder carry out that requires concentration	
Checking documents for accuracy	<input type="checkbox"/>
Report Writing	<input type="checkbox"/>
Committee Presentations / Interviews	<input type="checkbox"/>
Calculation	<input type="checkbox"/>
Driving	<input type="checkbox"/>
Being alert around children / vulnerable adults	<input type="checkbox"/>
Working on building sites or in properties	<input type="checkbox"/>
Interpretation of complex documents	<input type="checkbox"/>
Processing invoices	<input type="checkbox"/>
Operating dangerous machinery	<input type="checkbox"/>
Other	<input type="checkbox"/>
Please give examples and state how frequently you carry out this type of activity	

--

Section 5 - Emotional demands

This factor measures Emotional Demands placed on the job holder arising from contact or work with other people. It considers emotional transfer where the whole focus of the role is dealing with emotionally distressed people and there is a need to take on those emotions to support or help them. There are limited if any roles within PCNPA where this factor would need to be considered. Employees whose role occasionally demands them to deal with difficult customers will find the factor on 'Working Conditions' covers this.

Section 6: Finance

This factor measures the direct responsibility for financial resources, including cash, debits and credits, invoices, budgets and income.

If there is any financial accountability within the role please provide the details against any sections in the below table which are relevant for the job role (information provided may be subject to verification with the Authority's finance team):

Budget Heading	Staffing £	Other £	Total spend £	Income £	level of responsibility (using the relevant number (s) from Using the Key below)
Revenue					
Capital – ongoing schemes					
Total					

Options for levels of responsibility

1. Main Budget Holder - fully accountable and authorised through Finance
2. Accountable – responsible for setting a budget or make recommendations over relevant expenditure from a specific delegated budget.
3. Accounting - profiling, planning and monitoring of budget / income or auditing. This does not include monitoring of budgets, as this is associated with an administrative function.
4. Project Officer – fully accountable for specific capital allocations, this includes budget holder for project funding.

1. Does the post holder deal with banking, petty cash or process any invoices, cheques etc...? **Yes**
No

What is the approximate value of this per week? £ _____

2. Does the post holder have a Purchase or Credit Card? **Yes** **No**

Section 7 - Physical Resources

This factor measures responsibility for physical resources, including manual and computerised information, data and records, office and other equipment, fleet and machinery, building and equipment and stock and supplies.

Will the post holder undertake any of the following	What?	Responsibility level
a) handle data, either manual or computerised Yes <input type="checkbox"/> No <input type="checkbox"/>	Type:	
b) Does the post holder have responsibility for cleaning or maintaining building(s) or equipment? Yes <input type="checkbox"/> No <input type="checkbox"/>	What buildings/equipment:	
c) Does the post holder have responsibility for security of building(s), or equipment? Yes <input type="checkbox"/> No <input type="checkbox"/>	What buildings/equipment:	Sole responsibility <input type="checkbox"/> Shared <input type="checkbox"/>
d) Does the post holder have responsibility for stock ordering? Yes <input type="checkbox"/> No <input type="checkbox"/>	What stock will be ordered:	Lead responsibility <input type="checkbox"/> Shared <input type="checkbox"/>
e) Does the post holder have responsibility for development, design or adaptation of buildings, land or IT system Yes <input type="checkbox"/> No <input type="checkbox"/>	What systems/land or buildings:	Lead responsibility <input type="checkbox"/> Shared <input type="checkbox"/>
f) Does the post holder undertake any commissioning/procurement activity Yes <input type="checkbox"/> No <input type="checkbox"/>	What is being commissioned/procured and value:	Lead responsibility <input type="checkbox"/> Shared <input type="checkbox"/>
2. What is the value (if known) and type of the equipment the post holder will use?		
Type of equipment used	Approximate value of the equipment	
	Highest value item:	

Section 8 Working Conditions

Based on the information provided in the 'special conditions' section of the Person Specification, please indicate the total % of time (as a proportion of the whole job role) the post holder will be exposed to unavoidable external elements (e.g. inclement weather) or unpleasant, disagreeable or hazardous working environments. Do not include any travel time or any time where the post holder may be subject to any verbal abuse, as this is covered separately in the question below:

No exposure or minimal amounts	<input type="checkbox"/>	Up to 10%	<input type="checkbox"/>
11% to 50%	<input type="checkbox"/>	51% - 75%	<input type="checkbox"/>
Above 75%	<input type="checkbox"/>		

Does the nature of the role expose the post holder to any face to face (excludes abusive telephone conversations) casual verbal abuse (e.g. an aggrieved customer swearing)

Yes No

How often on average is the post holder subject to casual verbal abuse, please select one of the following options:

Once a week or less	<input type="checkbox"/>
twice a week	<input type="checkbox"/>
three times per week	<input type="checkbox"/>
four to five times per week	<input type="checkbox"/>
more than once per day on a daily basis	<input type="checkbox"/>

Does the nature of the role expose the post holder to serious verbal abuse on a weekly basis (e.g. abusive or aggressive behaviour specifically directed at the post holder due to their actions on behalf of the Authority, most likely to be of a prolonged nature from which the post holder cannot avoid as they need to continue to deliver the service)

Yes No

How often on average is the post holder subject to serious verbal abuse, please select one of the following options:

once or twice a week	<input type="checkbox"/>
at least three times per week	<input type="checkbox"/>
at least once a day on a daily basis	<input type="checkbox"/>
more than once per day on a daily basis	<input type="checkbox"/>

Please provide examples:

Section 9 Supervision

This section measures the direct responsibility for supervision, co-ordination or management of employees or others in an equivalent position (e.g. volunteers, contractors).

Does the Job Holder have full time responsibility for managing staff (this includes managing Performance, Training, Recruitment and Discipline)?

How many staff? _____ staff (not FTE but headcount)

Supervising /checking work/demonstration of duties only	<input type="checkbox"/>
For work experience/volunteers (e.g. occasional)	<input type="checkbox"/>

How many offices/buildings are the staff based at?

one

two or three

More than three

SIGN-OFFS

I confirm that this evaluation application form conveys a full and accurate description of the current roles and responsibilities of the job and supports the job description.

Line Managers Signature and name in CAPS

Head of Department Signature and name in CAPS

Human Resources Signature

Once the Job Description has been signed off by the HoD and Human Resources, it should be discussed with the post holder to ensure agreement.

Job Holder Signature and name in CAPS

Staff representation and membership of Internal Job Evaluation Panel

Nature Recovery	Tomos Jones
Regenerative Tourism	Daisy Hughes
Engagement and Inclusion	Libby Taylor
Placemaking	Sharron Thomas
Decarbonisation	Gary Meopham
Finance (including Fundraising)	Yvonne Jones
Human Resources (including CE Office team)	Kelland Dickens
Communications & Marketing	Marie Parkin
Admin & Democratic Services	Annere Martin
Unison	Liz Rooney

Notes:

KNOWLEDGE

To help complete this section, you may wish to merely record the level of knowledge required against each, using the key below:

Level 1: requires knowledge of the procedures for a limited number of tasks and the operation of basic tools and equipment. The job holder would follow straightforward oral and written instruction.

Level 2: requires knowledge of the procedures for a range of tasks. The job holder needs basic literacy and numeracy skills.

Level 3: as Level 2 with the addition of tasks and the operation of tools at a relatively complex level. Full literacy and numeracy skills are required. Literacy skills include composing and/or transcribing material ensuring that spelling, grammar and punctuation are correct. Numeracy skills include an understanding of percentages and decimals.

Level 4: requires practical and procedural knowledge across a technical or specialist areas.

Level 5: requires practical and theoretical knowledge in a specialist area. Relevant experience of at least 2 years, required to do job on entry.

Level 6: requires advanced theoretical knowledge across a specialist area. Previous education to graduate level must be in a subject matter which is specifically relevant to the job not a general indication of intellectual capability or there must be gradual level or membership of a relevant professional body (e.g. Graduate CIPD, CCAB, RICS, MRTPI, LLB, MICE, DIPSW) Where there is no relevant professional or other qualification the post holder would have 3 years' senior level experience.

Level 7: requires advanced theoretical, practical and procedural knowledge across a specialist area plus detailed knowledge of the associated PCNPA policies, practices and procedures.

Will have a level of subject knowledge and expertise to be able to advise and inform decision makers giving a greater organisational impact.

Knowledge would normally be built up over 3 +years' experience post professional qualification or equivalent depth of knowledge by experience where no such qualification exists, e.g., 3 years' experience managing highly complex projects or leading organisation wide projects. Generally, reports to Director or above.

Level 8: as Level 7 with the addition of knowledge for the specialist are and other related specialist areas across PCNPA. Generally, Head of and / or Director Level.

Recommendation: Members are presented with this paper for information and asked to comment and provide their expert counsel to ensure the successful implementation of this project.

(Further information is available from the Kelland Dickens, Human Resources Manager, on 01646 624825 – email kellandd@pembrokeshirecoast.org.uk)