Job Matching Guidance

Introduction

Jobs will normally be placed in one of the 10 grades of the grading structure, by matching them against profiles describing broadly similar types of work. These notes are intended to guide and support that matching process.

The purpose of matching is to make grade recommendations for the jobs in the area under consideration.

The contents of this guidance document are:

A. Background and Principles
B. Main Steps
C. Panel Members’ Responsibilities

Appendix A – Job Matching Panels
Appendix B – Job Matching Record

A. Background and Principles

There are 10 grades in the UoE structure, and profiles were developed for each of these grades to describe broadly similar types of work, highlighting the key factors that differentiate one grade from another.

These profiles have been adapted for the University of Edinburgh, in partnership with the recognised unions, from versions developed by other Russell Group Universities supported by Hay Group. They were developed based on a wide range of real jobs and are underpinned by Hay job evaluation to ensure that the different profiles for each grade are at the same level in job evaluation terms, to ensure equality. There are between one and four profiles at each grade depending on the range of work generally carried out at each grade.

Like job evaluation, job matching involves people making judgements. It is therefore important to have rules and mechanisms in place which ensure these judgements are as informed, structured and consistent as possible. Good quality job information, careful use of the profiles and reviews of consistency all have their roles in this process.

It is also important to ensure that those involved in matching concentrate on job content and not on other points such as personal capability or the market rate of pay. So, members of matching panels should:

- Focus on the job itself, not on the characteristics or performance of the job-holder
- Assume always that individual jobs are carried out at fully acceptable performance.
- Avoid any potentially discriminatory assumptions, such as about the types of jobs predominantly carried out by men or by women.

B. Main Steps

The main steps in job matching are:
1. Understanding the job

Job information should be available in the form of a job description in the standard format and a structure chart. Other relevant contextual data may come in discussion during the matching process from the head of the school/support department or others, and from the local HR adviser.

2. Matching the job

**Consideration of Matching/Grade:** The principles for considering matching a post against the Grade Profiles are to select the appropriate type of profile; find the most relevant grade; and select the grade that fits best. It may not be possible to find a complete match for each job within one type of profile and therefore it may be necessary to look across to more than one profile to arrive at a grade decision. All grades and types of job have a wide range of possible work activities, knowledge and skills, and few if any jobs will match all the criteria.

The aim is to establish the best general fit recognising that some elements of a job may better match the criteria of a higher or lower grade. The intention is to decide what the best or most complete fit is overall.

- Focus on the job itself, not on the characteristics or performance of the job-holder
- Statements of representative work activities are just that: 'representative'. It is not helpful to focus too much on the individual words or to worry about the fact that the job does not fit all aspects of the profile perfectly. The real point is that the content of the job feels right against the essence of the grade.
- Assume always that individual jobs are carried out at fully acceptable performance.
- Avoid any potentially discriminatory assumptions, such as about the types of jobs predominantly carried out by men or by women.
- Refer to the structure/organisational chart: it helps build a picture of how jobs are being matched and makes things easier to compare across schools/support departments when reviewing results.
- Panel members may want to put a job between grades or be unwilling to choose. Revisit these split jobs at the end of the whole matching session as comparator jobs may shed further light on your initial difficulty.

**Consensus/Outcomes:** Panels should try and reach consensus on outcomes initially through discussion of views but if unable to do so the reasons and views should be recorded by the Secretary to the panel who should also note any follow up action to be taken.

If through Matching the panel has found there is insufficient information to reach a decision on grade the panel should agree to seek further information and then reconvene at a convenient time to re-consider the case. If through Matching the Panel fail to reach a conclusion, cases...
can be progressed either through Job Analysis, or a subset of the panel to undertake job evaluation.

3. **Recording the decision and reasons**

A record should be kept of why a job matches the grade chosen. This will also provide information for any later review of the decision.

In addition to recording matching decisions, matching panels should note any relevant general feedback for consideration as part of any potential appeal process, and in line with the Grading and Re-grading Process and Principals, including a note of any difficulties encountered e.g.

- Why the job seems to match the agreed profile and grade (e.g. which work activities are most relevant).
- Any relevant additional contextual information which was considered and is not on the job description but influenced the decision.
- Whether any alternative profiles/grades were considered. If so, why they were considered and rejected, and any remaining doubts.
- If the job wasn’t matched, what action was recommended and why. If the panel could not reach a consensus, a note should be kept of the different views.

C. **Panel Members’ Responsibilities**

1. **Participation:** all panel members are expected to contribute to the panel discussion and to express their views on the match for the jobs. Members should show respect for the views of fellow panellists and should also be respectful in relation to the jobs, job-holders and areas under discussion. All members of the panel are equal in respect of the matching process. The local panel members are expected to provide useful contextual information and clarification, but no member should seek to represent the interests of a particular area or staff group.

2. **Conflicts of interest:** As matching panels are designed to be local, many panel members will be very familiar with both the jobs under consideration and the job-holders, and that is accepted. Panel members should, however, declare any conflict of interest beyond that, such as a close personal relationship with a job-holder, to either the panel chair or the local HR Manager.

3. **Preparation:** All panel members are expected to read all papers and reach initial views on the outcomes in advance of panel meetings, to ensure effective use of the panel’s time within the meetings and in accordance with the Grading & Re-grading Processes and Principles.

4. **Confidentiality:** Panel members must observe strict confidentiality regarding panel documentation, discussions and recommendations. Any discussions should not be discussed out with the panel meeting.

5. **Equality and Diversity:** All cases should be considered on their individual merit in accordance with the University’s Equality & Diversity Strategy which can be found at: [http://www.ed.ac.uk/schools-departments/equality-diversity/about stratégie-action-plan](http://www.ed.ac.uk/schools-departments/equality-diversity/about strategy-action-plan)

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¹ The Equality and Diversity Strategy was approved by Court on 7th November 2011 and takes effect from the same date. It replaces the previous Equality and Diversity Strategy and Action Plan; the University’s Disability, Gender and Race Equality Schemes and Action Plans; the Race Equality Policy and the Policy and Codes of Practice on Equal Opportunities in Employment and on Equality and Diversity for Students.
6. Appendix A

Job Matching Panels

A. Matching Panels

Composition

Consideration of all cases for re-grading will be by means of review by an appropriately constituted panel. Panels will be set up as follows:

a) Panel members will be drawn from a pool of staff trained in job matching. For cases where there is a job description, this will also require panel members to be trained in Hay job evaluation. In addition to management and HR representatives from the College/Support Group whose staff are being considered panels will normally include one Joint Unions Liaison Committee (JULC) and one management representative from outside the College/Support Group. Where the nature of the jobs being considered means it would be helpful, additional JULC and management representatives will be co-opted to the Panel.

b) Panels will be constituted to ensure that there is adequate understanding amongst panel members of the jobs to be considered.

c) Separate panels will be held to consider Academic and Support cases. A member of staff currently in an Support role who feels their role more closely matches the Academic profiles may submit a regrading application to the Academic panel (and vice versa) In considering such cases panels will ensure that staff in “hybrid” roles are not disadvantaged.

d) Panels for support staff will be convened by each College/Support Group on a six-monthly basis. Applications for upgrading up to and including grade 8 will be considered on a six-monthly basis. Applications for upgrading to grades 9 and 10 will be considered on an annual basis.

e) Panels for academic staff will be convened by each College on an annual basis to consider all cases up to and including grade 10.

f) For academic posts up to and including grade 8 the panel will have the provision to back date the effective date of promotions.

h) Decisions on regrading up to and including grade 9 will rest with College/Support Group panels

An Academic and a Support panel will be convened annually by Corporate HR on a University-wide basis to consider nominations for upgrading/promotion to grade 10 put forward by the College/Support Group panels

i) The University level Academic panel will act as the University’s Personal Chairs Committee

j) The University level Support panel will be constituted so as to ensure that there is adequate understanding of the jobs to be considered and appropriate representation from the Colleges and Support Groups

k) Panels considering applications or nominations for re-grading to 9 or 10 with the conferment of academic titles of senior lecturer, reader or professor will require supplementary information on academic reputation and impact.

Documentation

Panels members will receive
This Guidance
Profiles for each grade
A list of the jobs under consideration
Job descriptions for all jobs to be matched, whether generic or individual, in the agreed format (with any jobholders’ names and any references to current grades removed)
Organisation chart(s) covering all jobs in the area

Recording Decisions: The panel secretary is responsible for recording the discussion with the aim of the panel reviewing and agreeing the Minute after each post has been considered, including a clear rationale to feedback to the member of staff, including where the role matches the profiles, especially where the outcome is unsuccessful.

Notification will normally be issued to the member of staff, via their line manager, usually no later than a week after the meeting.

Due Process: If any panel members feel that due process has not been followed or have any feedback, they should note this within the meeting. The secretary should formally record any feedback as part of the Minute.

Updated DB March 2010
**Appendix B**

**Job Matching Record**

The following information should be recorded in relation to each job. Where possible, it is intended that this will be recorded on a database during local matching panel meetings.

- Job title
- Job reference
- School/Support Department
- Date of matching panel
- Grade
- Profile type
- Reasons for the match, explaining briefly:
  - Why the job seems to match the agreed profile and grade (e.g. which work activities are most relevant).
  - Any relevant additional contextual information which was considered and is not on the job description but influenced the decision.
  - Whether any alternative profiles/grades were considered. If so, why they were considered and rejected, and any remaining doubts.
  - If the job was not matched, what action was recommended and why. If the panel could not reach a consensus, a note should be kept of the different views.

The following are *fictional* examples of what records might include:

<table>
<thead>
<tr>
<th>Job Title:</th>
<th>Senior Secretary</th>
</tr>
</thead>
<tbody>
<tr>
<td>School/Support Department:</td>
<td>Student Services Department</td>
</tr>
<tr>
<td>Date of Evaluation:</td>
<td>30 March 2010</td>
</tr>
<tr>
<td>Grade:</td>
<td>4</td>
</tr>
<tr>
<td>Profile type:</td>
<td>Clerical/Administration</td>
</tr>
<tr>
<td>Reasons/Notes:</td>
<td>Job requires either vocational qualifications plus one year’s work experience, or around two years practical experience. Role holder plans ahead for days and weeks. Acts as initial contact for staff and therefore needs to know systems and processes, as well as being familiar with the work of the team. Representative work activities are a good fit, role holder will prepare non standard documentation and will create documents from a clear brief. In discussion, it was noted that some Grade 3 activities were present, eg collating materials, but on balance it was agreed that Grade 4 was the best overall fit. Matches 4a 2.1, 4a2.2, 4a2.10 etc</td>
</tr>
</tbody>
</table>

Updated DB March 2010
<table>
<thead>
<tr>
<th>Job Title:</th>
<th>Research Technician</th>
</tr>
</thead>
<tbody>
<tr>
<td>School/Support Department:</td>
<td>School of Botany</td>
</tr>
<tr>
<td>Date of Evaluation:</td>
<td>22 March 2010</td>
</tr>
<tr>
<td>Grade:</td>
<td>5</td>
</tr>
<tr>
<td>Profile type:</td>
<td>Technical services</td>
</tr>
<tr>
<td>Reasons/Notes:</td>
<td>Will require proven technical experience in specialism acquired over 2-5 years. Will need to understand and interpret requirements of staff and students. Uses complex techniques and equipment. Has to pass on knowledge by training others in use of equipment. Panel discussed how this role was definitely more than a Grade 4 as it was more specialised and needed more technical experience. Matches 5T2.1, 2.2. etc.</td>
</tr>
</tbody>
</table>