

GUIDANCE FOR MULTI-ACADEMY TRUSTS ON PAY & GRADING REVIEWS FOR SCHOOL SUPPORT STAFF

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NB: throughout the document reference is made to various JE documentation issued previously. The entire suite of JE guidance and technical notes can be accessed at (log in required): <https://www.local.gov.uk/our-support/workforce-and-hr-support/local-government-services/njc-job-evaluation>

1. INTRODUCTION

- 1.1 This guidance has been produced by the National Joint Council (NJC) for Local Government Services to assist multi-academy trusts (MATs) in carrying out pay and grading reviews for school support staff.
- 1.2 The status of the guidance is advisory. It is a matter for individual MATs to decide whether they undertake job evaluation (JE) and pay and grading reviews.
- 1.3 The guidance is intended for MATs that have decided to undertake pay and grading reviews for school support staff and MATs that are considering whether to undertake a review.
- 1.4 **The guidance has been written specifically for MATs.** It sets out the key decisions to be made and the basic steps to be taken. (References to more detailed generic NJC guidance on JE and pay and grading reviews are included in the text). If you are unsure of terms, see glossary on page 28.
- 1.5 The guidance assumes that existing pay and grading arrangements for school support staff are based on the NJC pay spine and that their contracts of employment incorporate the terms of the NJC for Local Government Services National Agreement (*'Green Book'*). Where this is not the case, the guidance may nevertheless be relevant and useful, particularly if MATs are considering reviewing their current pay and grading arrangements.
- 1.6 The JE scheme referred to in the guidance is the NJC JE Scheme (NJC JES). This JE scheme, based on equal value, was designed specifically to evaluate jobs in local government organisations, including school support staff. The other main JE scheme used in local government, including schools, is the Greater London Provincial Council JE Scheme (GLPC JES). The guidance can be “read across” in the case of MATs using the GLPC JES.
- 1.7 Both the NJC and GLPC JE schemes are suitable for evaluating jobs / roles found in MATs.
- 1.8 The guidance does not apply to teaching staff.

2. REASONS TO UNDERTAKE A PAY & GRADING REVIEW

- 2.1 Over time, the use of legacy pay and grading structures is likely to become problematic. Examples of the issues that can arise in MATs include:
 - The need to ensure that pay and grading arrangements for new starters are fair and non-discriminatory
 - The need to ensure that pay and grading arrangements are fair and non-discriminatory following reorganisation or restructuring within the MAT, and where, for legally permissible reasons, employees' terms and conditions are no longer TUPE-protected

- Incompatibility between the MAT's pay policy and legacy pay and grading structures and arrangements
- The complexity and cost of administering different pay / reward systems, particularly in MATs which have expanded in size / geographic coverage
- Recruitment and retention problems
- The impact on staff morale and employment relations where differences in pay / grading between employees undertaking the same or similar roles are not understood or seen to be fair.

The business case

- 2.2 Undertaking a JE exercise followed by a pay and grading review gives individual MATs the opportunity to adopt pay and grading structures that are more suited to their organisational objectives.
- 2.3 For MATs that use the NJC pay spine, the adoption of the new spine in April 2019 created a timely opportunity to update and review pay and grading arrangements. Where MATs do not currently use the NJC pay spine but are considering its adoption, the reconfigured NJC spine provides an ideal basis for designing a bespoke grading structure or revising their existing structure.
- 2.4 Well planned and competently executed pay and grading reviews should contribute to the effective management of MAT resources and value for money.

The equal pay case

- 2.5 While current pay and grading structures in most MATs are likely to be underpinned by equal value-based JE, there could be equal pay risks where, for example:
- MAT roles which are no longer TUPE-protected were evaluated by previous employers using different JE schemes.
 - New roles have been slotted into the existing pay and grading structure without having been evaluated.
 - Roles have changed to the extent that old evaluations might no longer properly reflect the demands of these jobs.
 - Support staff jobs were evaluated previously using the same JE scheme but by employers using different local conventions (i.e. additional local JE rules). This may have resulted in different legacy pay arrangements for staff who are or could be doing equal work in the MAT school(s) and whose terms and conditions are no longer TUPE-protected.
 - MATs have centrally-based or school-based roles which have not been evaluated.
- 2.6 For equal pay purposes, all MAT support staff are likely to be in the 'same employment' because the MAT is the employer and they will either work in the same establishment as any potential comparator or, if not, common terms and conditions will apply across the establishments in question. This means that in many cases it would be possible for a female employee to seek a male comparator (or vice versa) in any school in the MAT.

(For more information: see Equality and Human Rights Commission (EHRC) [Code of Practice on Equal Pay](#) (2011))

The employment relations case

- 2.7 In relation to employees' pay and grading, inconsistent treatment is likely to be seen as unfair by staff. This could damage morale and work against developing a "MAT / school team" culture among all employees. It could also undermine good employment relations.
- 2.8 Individual MATs will have different approaches to involving recognised unions in JE and pay and grading exercises. This guidance recommends that a partnership approach is taken (see section 3.9 below). It enhances transparency and employee confidence in the process. It should also help in minimising and resolving employment relations problems.
- 2.9 While JE and the design of grading and pay structures have a major technical component, it is important to appreciate that substantial resources and time will need to be devoted to employment relations issues from the outset.

3. UNDERTAKING A PAY AND GRADING REVIEW: WHAT WILL BE REQUIRED

- 3.1 JE and pay and grading reviews should not be embarked upon lightly. To be completed successfully, the review will need clear strategic direction and management, effective project management with realistic timescales, the involvement of school support staff unions' representatives and an excellent communications strategy.
- 3.2 Reviews will require:
- At board or equivalent level, clarity about the purpose of the review, the financial implications and how it will contribute to fulfilling the strategic objectives of the MAT and its legal responsibilities as an employer
 - Commitment to partnership working and agreement to set up, at MAT level, a joint union-management steering group
 - Executive leaders' buy-in and commitment to the process at academy level
 - Operational management centrally (at MAT level) and locally (at school / cluster level)
 - Ownership by the MAT trustees / directors and executive leaders
 - Strategic and financial oversight by the MAT board
 - Strategic management by MAT executive leaders.
- 3.3 As key decision-making stages in the review process may not synchronise with the cycle of board or equivalent meetings, to avoid slippage, arrangements may be needed to ensure that executive leaders can seek interim authorisation or board approval (for expenditure, for example) as necessary. (It may be appropriate to form a board sub-committee for these purposes; and / or to have a trust sponsor on the executive leadership team).

- 3.4 Where local governing bodies and / or head teachers have delegated powers or responsibilities in relation to school support staff pay and grading, these may need to be revisited to ensure that they will be compatible with the strategic direction set by the MAT board for the review and future pay and grading arrangements for support staff.
- 3.5 At MAT level, oversight of the operational management of the review should involve close working between the project management team and the joint steering group (see below).

Strategic decisions

- 3.6 The first strategic decision to be made is whether the MAT undertake a review. Relevant considerations may include:
- What the MAT wants to achieve by undertaking a review.
 - Whether the existing pay and grading arrangements are considered to be compatible with, and supportive of, the ethos, strategic objectives and policies of the MAT
 - The risk of exposure to equal pay and related discrimination claims and the increased risk if the review were to be deferred or delayed
 - Resourcing and funding issues - public sector organisations' experience is that reviews cannot be achieved at nil cost. Further discussion of costs is considered later in this guidance.

Project planning, management and logistical issues

- 3.7 Early development of a project plan and active project management are essential to a successful outcome:
- At every stage of the review, there will be practical, logistical issues to be dealt with. For example, JE requires up-to-date, accurate job descriptions. For pay modelling and equality impact assessment, if payroll data and employee data are held on different systems, a technical solution will be needed to bring the required data together.
 - Decisions will need to be taken as to who (from the MAT and recognised unions) will be involved in the different phases of the review, for example, as steering group members, job analysts / panel evaluators; in job matching, consistency checking JE outcomes, pay modelling; and in dealing with appeals and implementation issues. Experience shows that even in small organisations, it is unrealistic to expect "someone in HR" to undertake the review – it requires various coordinated teams of people to undertake different tasks during the review.
 - Where external consultants are engaged to evaluate jobs and design a new pay and grading structure, this will reduce but not eliminate the need for MAT staff and union representatives to be actively involved throughout the review.
 - Those who will be directly involved in the review should receive appropriate training, including project management team and steering group members,

evaluators / job analysts, and those involved in consistency checking, pay modelling and appeals.

- 3.8 In considering how the review is to be resourced, there may be scope for MATs to pool resources, for example, sharing the costs of externally provided training / consultancy support.

Partnership working

- 3.9 The NJC advocates a partnership approach to undertaking JE and pay and grading reviews. Aside from any collective obligations arising under TUPE or subsequent collective agreements, we would commend this approach to MATs for these reasons:

- Involvement of union representatives and openness help to build trust and contribute to the smooth running of the review and its implementation
- JE exercises and pay and grading reviews create uncertainty among staff. Union representatives who have been involved on a joint basis from the outset are better equipped to explain the process and its implications to members
- If pay protection becomes necessary, the arrangements will need to be jointly discussed.
- Joint training should be organised for management and union representatives on review principles and processes, including JE scheme design, job analysis / evaluation, job matching, consistency checking, pay modelling and designing pay / grading structures
- Revised pay and grading arrangements / terms and conditions will most likely be subject to a ballot of union members. A partnership approach helps ensure that union representatives can advise union members on the employer's offer from a fully informed position
- Union representatives contribute to the pool of people required to carry out tasks such as evaluating jobs and consistency checking JE outcomes. (They may also have relevant experience of evaluating jobs and implementing pay / grading reviews).

- 3.10 While the executive leaders and MAT board will be responsible for the strategic direction and management of the review, a partnership approach would establish common objectives for the review, and at an operational level, joint working on the development and monitoring of action plans for each stage of the review. Accordingly, it is recommended that, at MAT level (as opposed to regional / school level), a joint union-management steering group is formed at the outset of the review. Each side should appoint its representatives.

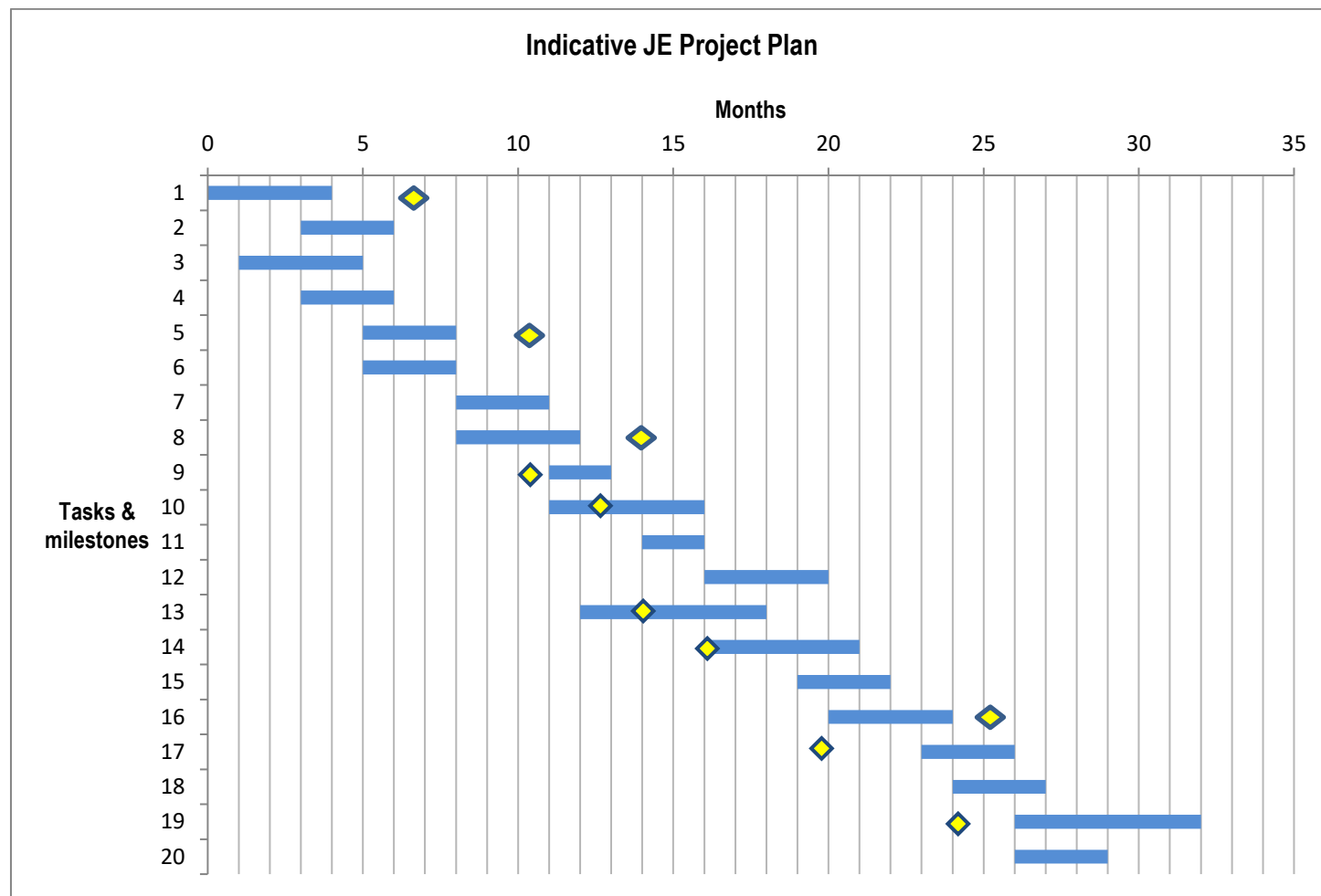
- 3.11 Union representatives who are steering group members should have sufficient paid facility time to participate. Where other school-based union representatives are involved (for example) in assisting with evaluations, they may require additional facility time or cover. Similarly, direct involvement at various stages in the review will make demands on managers' and other staff members' time which need to be accommodated.

The timescale for the review

- 3.12 It is crucial that realistic timescales are set for the review. Timescales will vary according to MATs' individual circumstances. Experience shows that at a minimum, a timescale of at least two years should be planned for, taking into account term times when practitioners are available to undertake the project.
- 3.13 An indicative project plan with key tasks and milestones is shown in the chart below.
- 3.14 The project management team should ensure that milestones are being met and contingency plans are in place to deal with delays. A joint steering group can assist with monitoring progress at an operational level, including flagging any unanticipated technical or other problems that may arise.
- 3.15 NJC experience is that organisations may underestimate the length of time involved in 'signing off' final offers with union negotiators and in unions holding consultative ballots of their members on employers' final offers. Union protocols may require that final offers are vetted at national or regional union level before consultative ballots can be held.
- 3.16 Depending on local circumstances, it may be advisable for MAT senior management to make contingency plans in the event that the consultative ballot does not deliver a settlement owing to rejection of the employer's offer by union members. This may entail a further period of negotiation and possibly conciliation to achieve a settlement.

Key to **high-level tasks and milestones** () ◆

1. Take strategic decision to undertake the review.
Set up joint steering group. Agree TU facility time.
Agree JE scheme to be used. ◆
2. Arrange and deliver joint training.
3. Ensure logistical / support arrangements are in place
(including financial sign-off).
4. Undertake jobs audit / update job descriptions.
5. Agree selection (**sample**) of benchmark jobs to evaluate. ◆
6. Review / update local conventions currently used.
7. **Evaluate** the benchmark jobs sample. ◆
8. Consistency check benchmark sample evaluations.
9. Agree guiding principles and basic design of new / revised pay and grading structure. ◆
10. Arrange and implement job matching and / or evaluate remaining jobs. ◆
11. Set up and train joint pay modelling team.
12. Model / test options for pay and grading structure.
13. Consistency check job matching / evaluation outcomes. ◆
14. Equality impact assess options for new structure **and any related changes to terms and conditions, including the finalised 'draft' structure / offer to employees.** ◆
15. **Plan / prepare for notifying individual employees of outcomes.**
16. **Confirm and agree** protection arrangements and the appeals procedure. ◆
17. Communicate proposed final offer to employees.
Unions formally consult members on the offer. ◆
18. Allow contingency for re-opening negotiations on offer.
19. Implement the agreed pay and grading structure. ◆
20. Implement appeals arrangements.



Note: During the review, at regular intervals and/or when milestones are reached, the MAT should communicate progress to employees.

4. UNDERTAKING JOB EVALUATION

Advantages of Job Evaluation

- 4.1 The application of a properly designed and maintained analytical JE scheme is the most effective tool for the development of a fair and transparent pay structure.
- 4.2 JE provides a fair, systematic and transparent method for assessing the relative value of jobs within the organisation. It can form the basis for the pay and grading system implemented by the organisation.
- 4.3 It can provide a defence to equal pay claims where the scheme is:
- analytical i.e. it is factor-based
 - thorough and impartial in both its design and implementation
 - covers both claimant and comparator jobs
 - gender neutral; and
 - reliable. Its procedures and practices must be up to date and documented, as should evaluation results, and JE must be fully completed across the organisation.
- 4.4 For more information, see:

[Equal pay: How do I carry out JE?](#)

Green Book Part 4.9, paragraph 6: Advantages of JE;

[ACAS Advisory booklet JE: Considerations and risks.](#)

Choosing the JE Scheme

- 4.5 A key decision to be made is which JE scheme to use.
- 4.6 There are advantages in using a tried and tested JE scheme which has been extensively used to evaluate school support staff jobs. The NJC JES and GLPC JE schemes are in this category.
- 4.7 MATs can be confident that, for example, the NJC JES meets the standards required for an equality-proofed JE system.
- 4.8 (For further information: see NJC JE Technical Notes (2): *The principles of the NJC JES*, (5): *Factors & weighting of the Local Government NJC JE Scheme*; (12): *Evaluating knowledge and skills*.)
- 4.9 In keeping with best practice, the NJC JES has been regularly reviewed by the national employers and unions to ensure that it remains fit for purpose and complies with EHRC guidance on JE scheme design. Reviews in 2013 and 2019 concluded that no fundamental changes were necessary to the scheme design i.e. the factor plan and weightings. However, the factor guidance has been updated to reflect changes in jobs such as the expanded use of digital technology and service reconfigurations in local government organisations, including the development of MATs.

- 4.10 Importantly, for organisations employing school support staff, the NJC has developed Model School Support Staff Role Profiles. They are applicable to all types of schools and cover 59 roles in five job families. The role profiles provide indicative evaluations of these roles using the NJC JES. (Outcomes can also be read across to the GLPC JES.) While role profiles do not take the place of job descriptions or job information necessary for full evaluations, they are intended for use in job matching exercises (see below).
- 4.11 To support users of NJC JES, the NJC also issues technical notes, examples of which are cited throughout this guidance under ‘further information’.
- 4.12 The JE schemes most widely used in schools, such as the NJC JES and GLPC JE scheme, are available in computerised form.
- 4.13 The Local Government Association (LGA) provides a consultancy service that includes provision of support throughout the JE process. For further details including costs, please contact info@employerlink.co.uk
- 4.14 The LGA facilitates a network for MAT HR leads. Contact info@employerlink.co.uk for more details.

Using a bespoke scheme

- 4.15 Some MATs may be attracted to using a bespoke JE scheme designed specifically for school support staff. In assessing this option, MATs are advised to carefully consider:

Legal risk involved in using novel and untested schemes: In particular, the MAT should be satisfied that any proposed bespoke scheme fulfils the criteria established by law and set out in EHRC guidance (referred to above) for a JE scheme to provide a valid defence to an equal pay claim.

Value for money: The costs involved in designing a bespoke scheme and ongoing consultancy support. (The set-up costs of using an established scheme may be considered high but over the longer term the overall cost may be less than using a bespoke scheme).

IT logistics and data security: Whether a bespoke JE system will securely retain JE histories and have the capacity to track evaluations / moderation outcomes and re-evaluations over time.

Employment relations implications: Union representatives can be expected to support the use of established schemes which have been commended nationally by unions and employers. However, it is highly probable that the proposed adoption of an untried and untested scheme will not be agreed to by union representatives in the absence of satisfactory assurances as to its design (see the EHRC guidelines above) and assessed non-discriminatory impact on the pay and grading of jobs.

It is important to appreciate that the use of the NJC JES (or the NJC pay spine) does not commit the employer to adopt a particular type of pay and grading structure (see below). The NJC JES does not incorporate ‘points to pounds’ formulae setting

out the relationship between JE points and grading / pay. This affords individual MATs considerable flexibility in designing a pay and grading structure for support staff.

Using more than one JE scheme

- 4.16 It may be that the MAT has staff in different schools and / or locations whose jobs were evaluated using different JE schemes. As mentioned earlier, this can give rise to equal pay challenges where the roles held by the claimant and comparator (no longer TUPE-protected) were evaluated under different schemes.
- 4.17 Some MATs may have inherited a structure whereby higher-level roles were evaluated under a different JE scheme (for example, the Hay system) from that used to evaluate support staff roles at a lower level. It is legally permissible to use two JE schemes. However, where the MAT proposes to continue with dual arrangements, depending on where the dividing line is placed in the proposed new structure, equal pay issues may arise in relation to roles in the 'boundary zone'. It is therefore important to evaluate these jobs under both JE schemes, and during pay modelling, to equality impact assess the allocation of jobs to the proposed grades.

(For more information: Green Book, Part 4.9, paragraph 10: Using two schemes.)

Carrying out a jobs audit

- 4.18 Before starting to evaluate jobs, it will be necessary to carry out an audit of all support staff jobs in MAT schools, if this has not already been done.
- 4.19 It involves preparing a comprehensive list of job titles within the organisation and gathering together relevant job descriptions. By comparing job descriptions for similar areas of work it will be possible to identify how many different job roles there are and how many share common job titles. Some roles will be common to all schools (although their duties may vary) and they are likely to have common job titles. Other jobs may be the same or broadly similar but have different job titles. In addition, there may be some 'one off' jobs.
- 4.20 Where jobs are the same or broadly similar but have different job titles, it will be necessary to rationalise job titles, at least for JE purposes. This may appear to be a laborious task but is essential to the next steps in the process and a good investment of time for the future. (Where common job titles do not exist across the MAT, this may be an opportune time to implement them, in consultation with employees and their trade union representatives.)
- 4.21 Up-to-date job descriptions should be in place for all roles. Revisions to an existing job description, or the creation of a written JD for an existing post, should be agreed between the job holder and line manager prior to the JE process. Other job information used in the JE process, such as person specifications and reporting relationships, should also be up to date.

(For more information: Technical Notes (8): Generic jobs and job descriptions; (11): *Job information for JE*; (13): *Implications of mergers, shared services arrangements and other reconfigurations in the local government sector.*)

Paper version or computerised JE

- 4.22 At an early stage, a decision will need to be taken as to whether:
- evaluations are to be carried out manually, using the 'paper version' of the scheme - typically by small panels of trained evaluators nominated by unions and management; or;
 - evaluations are undertaken using a computerised version of the scheme.
- 4.23 As evaluating jobs can be a lengthy process which is time-consuming for those involved, large MATs may want to use a computerised JE scheme.
- 4.24 Advantages of computerised JE include the assurance that evaluations are conducted on a consistent basis over time and that systematic records are kept of evaluations and how scores were arrived at. The scores are available for moderation for consistency checking.
- 4.25 The computerised version of the NJC JES uses [Gauge+ software](#), developed by [Pilat](#), a specialist HR software provider.
- 4.26 The cost of purchasing the Gauge+ licence and software (which is negotiable with clients) includes training for the in-house personnel ('job analysts') who will interview job holders using the Gauge+ software. Gauge+ also includes pay and grade modelling software.

Local conventions

- 4.27 Because the NJC JES was designed to evaluate a wide range of jobs in different organisations, it allows for local rules i.e. 'local conventions' (or, in Gauge+ software, 'local help text') to be jointly agreed and added by user organisations. The purpose of local conventions is to provide local interpretations of the wording of JE factors (including the computerised questions and answers), which can then be applied consistently to evaluations in those organisations.
- 4.28 Local conventions are additions to the NJC factor guidance notes. The JES factor level definitions must not be altered and cannot be altered under the Gauge+ JE system.
- 4.29 As a first step, MATs should review the local conventions that were used by previous employers in evaluating jobs. Existing local conventions should be:
- rationalised (where jobs were evaluated by previous employers using the same JES but different local conventions); and
 - amended or replaced where they are out-dated or otherwise unsuited for use by the MAT; and
 - checked to ensure they are consistent with current NJC JES factor guidance – most recently amended in 2019.
- 4.30 Provisional local conventions should be drawn up and tested during the evaluation of the benchmark sample of jobs (see below).

(For more information: Technical Note 1: *Drawing up local conventions.*)

How many jobs need to be evaluated

- 4.31 The JE process does not require every job to be fully evaluated. Full evaluation can be restricted to a representative sample of roles within the MAT. The number of roles required for a representative or 'benchmark sample' will depend on the size and geographic coverage of the MAT. As a rule of thumb, we recommend that a benchmark sample should comprise no fewer than one-third of MAT support staff roles.
- 4.32 To ensure that it is representative, it is important to ensure that the benchmark sample is:
- drawn from across all levels of the organisation's structure in which school support staff work and geographic locations in which they are based;
 - typical of the range of jobs within the MAT;
 - reflective of the diversity of the MAT workforce, with particular regard to protected characteristics; and
 - includes newly emerging jobs
- 4.33 The selection of the benchmark sample, including, for example, the number and type of benchmark sample jobs, should be jointly considered and agreed by the steering group.

For more information: Green Book, Part 4.9, paragraphs 10.6-7; Technical Note 3: *The role of benchmark jobs in implementing JE.*

Non-benchmark jobs

- 4.34 The remaining jobs should be assessed by a process of factor comparison with the jobs which have been subject to full evaluation. It is recommended that MATs use the NJC tool that has been developed specifically for this process, i.e. job matching using school support staff model role profiles.
- 4.35 The job matching process should:
- be based on comprehensive, up-to-date job information, for example, a completed job description questionnaire; and
 - involve an objective assessment of the job information. (Job matching can be undertaken by panels or using Gauge+ software. In either case, it is imperative that those undertaking job matching are appropriately trained.)

(For more information: Technical Notes 4: *Options for dealing with non-benchmark jobs*; NJC Circular 23 July 2013, *NJC JES: Development of model school support staff role profiles*; NJC JE Technical Note 16: *Using role profiles to implement JE*; Green Book, Part 4.9, paragraph 10.6: Representative sample.)

Consistency checking JE outcomes

- 4.36 Whether evaluations are carried out using paper-based or computerised JE, it is critically important to quality assure the process by consistency checking JE outcomes – a process also known as ‘moderation’.
- 4.37 Moderation should be carried out:
- After the benchmark sample of jobs has been evaluated; and
 - At regular intervals during the remaining evaluations / job matching; and
 - When all evaluations have been completed and before any publication of results
- 4.38 The types of checks that should be undertaken as part of moderation are set out in NJC Technical Note 14: *Consistency checking of JE outcomes*.

Mainstreaming JE

- 4.39 For more information on issues that arise towards the end of, and immediately following a JE exercise, see Technical Note 10: *Mainstreaming JE*.

5. DEVELOPING A PAY AND GRADING STRUCTURE

- 5.1 The key stages in developing a pay and grading structure include:
- producing a rank order of jobs through JE;
 - developing pay and grading structure options;
 - carrying out pay modelling and costing the preferred option(s); and
 - conducting equality impact assessments.

Developing the pay structure

- 5.2 There are advantages in MATs using the NJC spine in the context of the review as it provides:
- Transparency
 - Headroom for future increases in the National Living Wage
 - A sound basis for developing a common pay and grading structure for support staff across the MAT (aside from those who are TUPE-protected)
 - Flexibility as the NJC pay spine can accommodate a wide range of pay and grading structures as it does not have ‘inbuilt’ grades. (It is also possible, for example, for a MAT to use the NJC pay spine but not the NJC JES.)
 - The option of extending the NJC pay spine by adding pay points above spinal column point 43, and
 - Familiarity, as the existing support staff, HR and payroll managers and union representatives will be familiar with the NJC pay spine.

Fixed Pay Points or Salary Scales

- 5.3 A major issue for the parties will be to determine whether grades should be based on:
- fixed pay point ('spot') salaries, where each grade is associated with a single pay rate; or
 - salary scales, consisting of a range of pay points which allow for incremental progression
- 5.4 There are potential advantages and disadvantages to each of these options for employer and employee. The most significant are shown in the table below.

Advantages and disadvantages of salary scales vis-à-vis fixed pay points

Salary Scales	Fixed Pay Points
<p><u>Advantages:</u></p> <ul style="list-style-type: none"> • they are capable of recognising extra skills and competency gained through experience; • they can motivate employees and improve morale; • they can be used as an aid to recruitment and retention. 	<p><u>Advantages:</u></p> <ul style="list-style-type: none"> • they establish the 'rate for the job' and are potentially the least discriminatory system; • they are simple to understand and transparent; • they are suitable for jobs having little scope for progression after the initial induction and training.
<p><u>Disadvantages:</u></p> <ul style="list-style-type: none"> • they can be less transparent and more complex than spot salaries if not based purely on length of service e.g. performance-related pay; • they may be more open to challenge on discriminatory grounds if the scale consists of a large number of increments. However, anything up to six increments in a grade to be achieved in five years of annual progression is generally considered to be compliant with age discrimination legislation. 	<p><u>Disadvantages:</u></p> <ul style="list-style-type: none"> • they do not reward additional expertise gained through experience in job; • they demotivate employees through lack of salary progression; • if only used at certain levels within the grading structure (e.g. at the lower end), they may be perceived by the staff affected as not valuing these jobs.

- 5.5 It is possible to develop a grading structure which has a mix of fixed pay points and salary scales. For example, fixed points are sometimes used for grades at the bottom of the structure. However, this option may increase the scope for

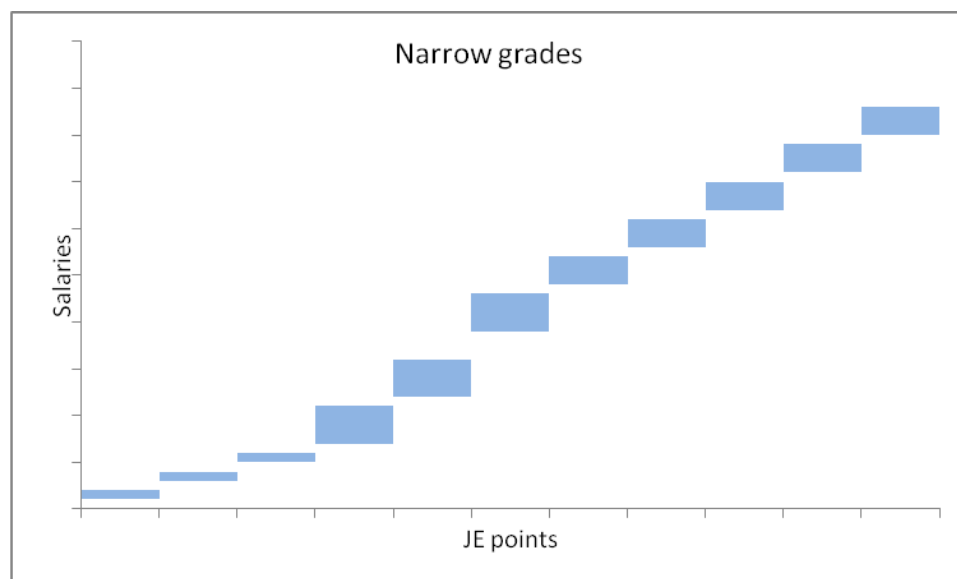
discrimination where the jobs on fixed pay points are dominated by a single sex. There needs to be objective justification for any distinction between those jobs paid on scales and jobs paid on single pay points.

- 5.6 Having grades with varying numbers of increments may increase the scope for discrimination where some grades are dominated by a single sex or another protected characteristic, such as race. To reduce the risk of legal challenge the parties would need to be able to demonstrate that the choice of grades with different numbers of incremental points is objectively justified.

Types of grading structures:

Narrow grades (multi-graded structures)

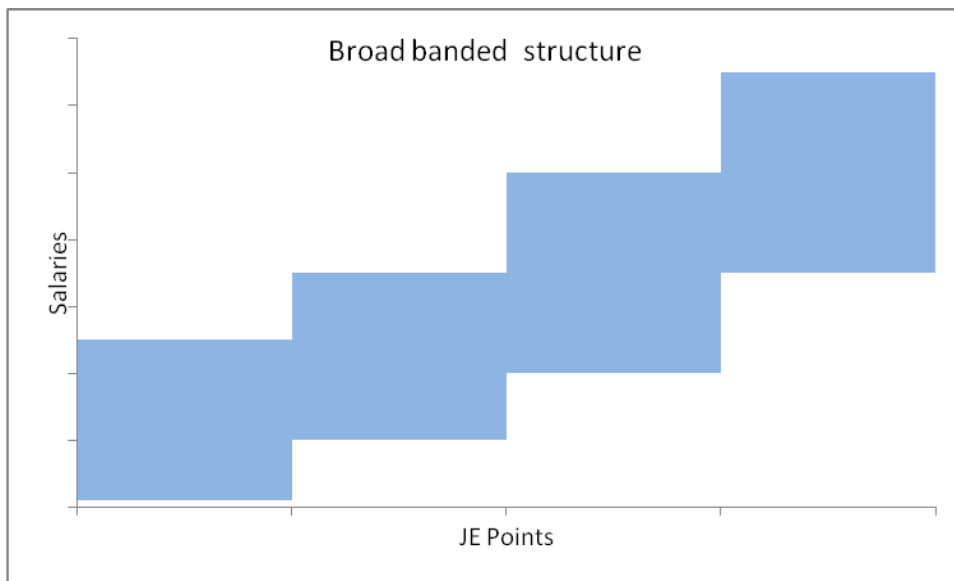
- 5.7 Narrow-graded structures continue to be the most commonly used in local government organisations and are widely used by MATs. Where the MAT has implemented the new NJC pay spine (introduced in 2019) or proposes to adopt it, and a narrow-graded structure can accommodate any changes to the rank order of jobs, there are clear advantages in retaining this type of grading structure.
- 5.8 Narrow grades (in the sense of the number of pay points in each grade) are relatively easy to manage, for example, in relation to cost control. A typical local government pay structure for NJC staff has 10 to 15 grades. Narrow grades are less prone to equal pay challenges than broad-band structures. They allow for more differentiation between jobs within the organisation, and place greater emphasis on expertise and experience.
- 5.9 They are also more suitable for use with automatic progression. The example below shows 'gapped' narrow grades. Narrow grades may also 'abut' (i.e. the top salary point for the lower grade and the lowest salary point for the higher grade are the same). Less commonly, some grades with incremental scales may overlap by one or two incremental points, for example. It is also possible for a narrow-graded structure to have a mix of gapped, abutting and overlapping grades, although this should be capable of objective justification.



5.10 There are two main alternatives to narrow-graded structures:

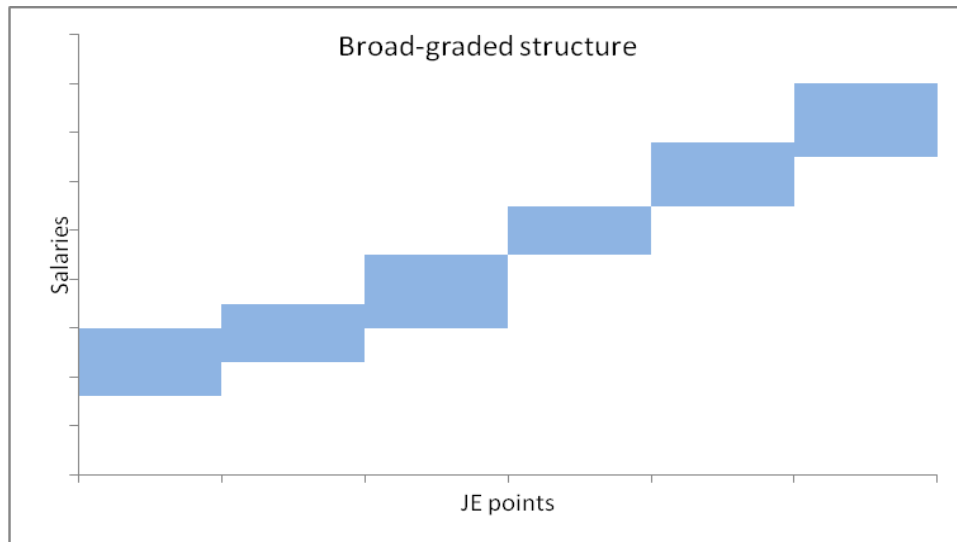
Broad bands

5.11 Broad-banded structures have a wide range of points in each grade. They are generally associated with flatter organisational structures and may allow greater pay flexibility and lateral career moves. Pay progression is not automatic. Broad-banded structures are mostly found in organisations where market rates are an important criterion in setting pay in order to recruit / retain staff. However, broad bands are susceptible to challenge on discrimination grounds because jobs of varying weights (as measured by JE) are likely to be in the same band and there may be large overlaps between bands (see the section below: Establishing grade boundaries). A typical broad band pay structure might have 4 to 6 bands.



Broad-graded structures

- 5.12 Broad-graded structures have fewer grades than narrow-graded structures but not as few as broad-band structures. A broad-graded pay structure might have six to nine grades. As with narrow graded structures, grades may abut, overlap and / or be gapped, as shown in the example below.



- 5.13 Broad-graded structures tend to be used by organisations that link pay to market rates. JE may be used to set the grade boundaries, with market rates being used to establish pay ranges and fix salary levels.
- 5.14 In particular, broad-graded structures may appeal to MATs seeking a closer alignment between MAT salaries and market rates and / or introducing alternatives to incremental pay progression. In considering the options of broad banding / grading, these issues should also be carefully considered:
- Difficulties in establishing appropriate market rates for all MAT jobs and obtaining accurate and up-to-date information about market rates.
 - The capacity of the MAT to successfully introduce broad-banded / graded structures. For example, alternatives to incremental progression are resource-intensive to introduce and maintain.
 - Salary costs can be more difficult to manage and control compared with narrow-graded structures.
 - Whether the career development and progression opportunities for employees often associated with these structures are deliverable.
 - The risk of equal pay challenges (as mentioned above) and discrimination claims as such structures may lack transparency and allow for more managerial discretion in respect of individual employees' pay than narrow-graded structures.

Number of Grades

- 5.15 There is no single solution to this question. The choice of the number of grades under a new grading structure will in part be determined by:
- Whether the objective is to produce flatter organisational structures and more flexible pay arrangements and/or market-led pay;

- The choice / design of the pay spine;
- The choice between broad bands, narrow bands or broad-graded structures;
- The outcomes of the JE exercise - the points distribution will in part inform the extent to which clear differences in job sizes can be identified.

Pay Progression

- 5.16 Where grades consist of salary scales (not fixed points) a decision will need to be made on the basis for progression within each grade. Progression can be based on:
- Length of service. (Incremental ('automatic') progression is transparent, relatively inexpensive to administer, and allows for a high level of salary cost control.)
 - Skills, organisational values, behaviours and competencies;
 - Contribution (including hybrid systems);
 - Performance; or
 - a combination of the above
- 5.17 In terms of potential age discrimination, the Equality Act 2010 specifically permits pay and benefits to be based on length of service up to a period of five years, after which the employer needs to reasonably believe that further length of service progression fulfils a business need.
- 5.18 Pay progression systems which link pay increases to individual (or team-based) merit or performance are more complex to administer and will require:
- objective, clear and relevant criteria against which the contribution, competence or performance will be measured;
 - sufficient resources to develop the organisational systems necessary to implement and operate the pay progression system;
 - non-discriminatory and transparent processes of assessment by managers; and
 - investment in training for managers and employees to create a 'level playing field' for all employees to achieve the required standards / criteria. Term-time only staff must have equal access to training and development opportunities (Green Book, Part 4.12).
- 5.19 Equality Impact Assessments of proposals for progression and regular post-implementation equality monitoring will also be essential. (See 5.38 on Equality Impact Assessments and Equal Pay Audits.)

Career Grades

- 5.20 'Career grade' schemes provide a means of enabling progression within or through a grade structure or hierarchy. They are generally associated with professions or careers within which the acquisition of competence and skill adds to the employee's potential to contribute to the organisation. Employees can progress through a number of grades as they achieve specified attainment targets (usually attainment of formal qualifications or undertaking more responsible duties). Such schemes have been the subject of a number of successful equal pay claims. These have been the consequence of the level of work undertaken by individuals not matching their progression through the career grade.

- 5.21 A career grade may be viewed as a series of jobs with different levels of job demands and responsibilities, often requiring different knowledge and skill levels
- 5.22 To reduce the risk of legal challenges it is recommended that career grade schemes should:
- require the employees to undertake the level of duties and responsibilities commensurate with the grade being paid, not just be based on completion of training or attainment of a qualification to allow them to carry out such work;
 - be available for all comparable groups, and not restricted to jobs dominated by one gender; and
 - be operated in a consistent non-discriminatory way, especially if they are
 - dominated by different genders.
- 5.23 Existing career grade schemes should be also be subject to equality impact assessments as part of the JE process to ensure that they are non-discriminatory in design, operation and access.
- 5.24 Organisations should also undertake regular equalities monitoring of the schemes to ensure equality of access and of operation.

For more information: Technical Note 7: Skills pathways and career grades and JE.

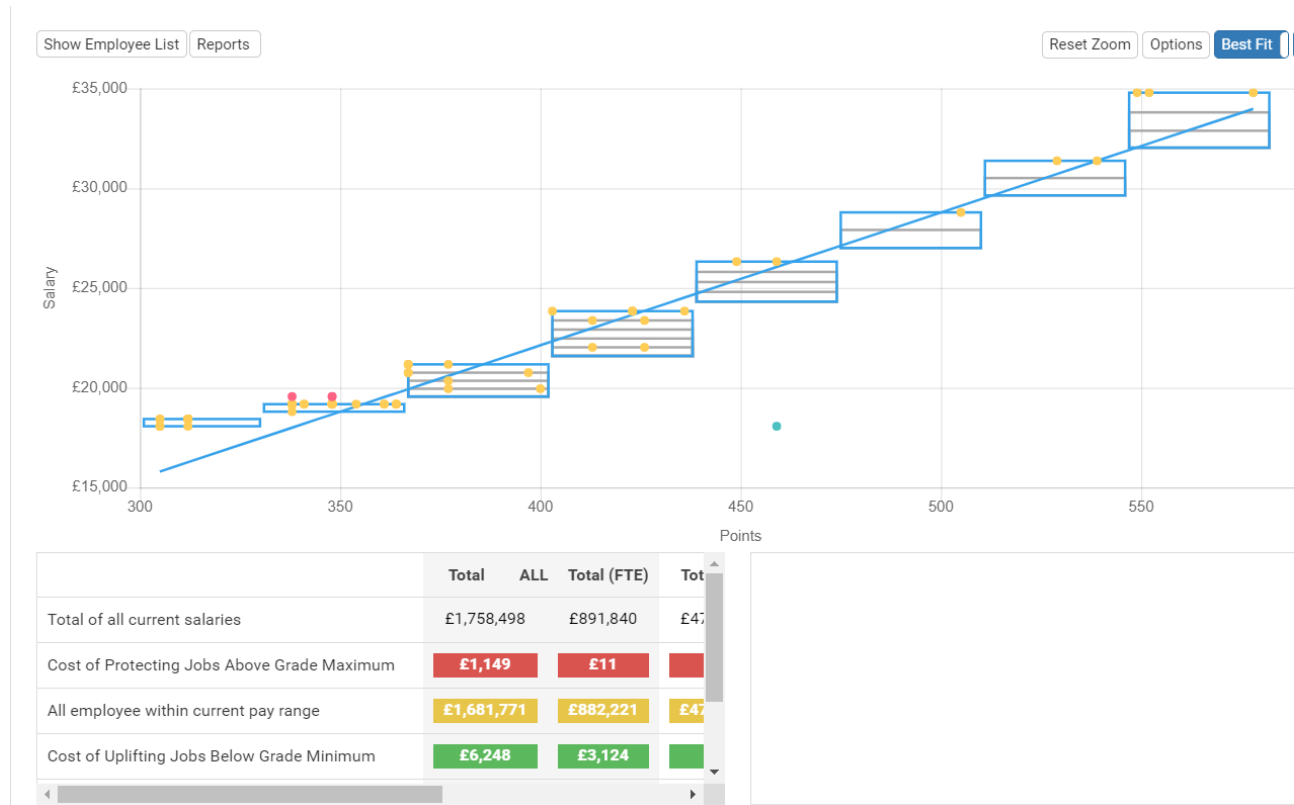
Establishing Grade Boundaries

- 5.25 In setting grade boundaries, MATs should seek to group jobs with similar JE scores into one grade by drawing boundaries between clusters of jobs.
- 5.26 Where clear clusters and breaks are not obvious, MATs should avoid drawing boundaries in a way which separate jobs with broadly similar scores so that, for example, jobs occupied mainly by women end up in a lower grade to those occupied mainly by men, just above the grade boundary line.
- 5.27 The number and width of grades needs careful consideration and should be consistent. Very narrow grade bands may create pay differences which cannot be justified by the actual differences in scores or rankings. Relatively few but wider bands may provide scope for greater flexibility, but if they also result in significant differences in men's and women's position within the grade, these differences will need to be justifiable.
- 5.28 Overlapping pay scales can raise the problem of individuals doing work of greater value than colleagues in the lower grade but potentially being paid less. This carries equal pay risks. If an Equality Impact Assessment (see 5.38 below) reveals any potentially discriminatory impact, alternative options should be modelled. Generally, the use of overlapping scales should be avoided. If used, for example, on a temporary basis in transitioning to a new pay structure, the degree of overlap should be minimised.

Pay Modelling

- 5.29 MATs are recommended to begin grade and pay modelling at an early stage in developing pay and grading structures. This can be done using Excel or similar software in small organisations, but larger MATs are advised to use pay modelling software. Pilat's Gauge+ software includes a pay and grade modeller. Zellis (formerly LinkHR, NGAHR) provides pay modelling solutions via their [pay modelling software and Reward Consultancy](#) that can also be used with the NJC JE scheme. Clients are provided with training in pay modelling by the software providers. It is advisable to have union representatives on the MAT pay modelling team and to include them in pay modelling training.
- 5.30 A major advantage of using pay modelling software is that it allows the pay modelling team to test more easily a wide range of options for the pay and grading structure.
- 5.31 The scatter diagram below shows the relationship between current basic salary (vertical axis) and the JE evaluation scores (horizontal axis). Each dot represents an evaluated role.
- 5.32 There are a number of steps to assist in developing a pay and grading structure:
- A regression analysis or 'line of best fit' is drawn between the evaluated scores
 - Next, a minimum and a maximum for current salary as well as evaluation points for each grade box can be plotted
 - Then overlay the pay policy line
 - Once the grade boxes are established, we can see whether there are jobs beneath the minimum salary for each grade called 'green-circled' jobs. (Any change in the salaries of these jobs represents a 'real cost' increase in the pay bill.
 - We can also see jobs currently evaluated at a certain level, but paid above the salary maximum; these are the 'red-circled' jobs and will be subject to the negotiated pay protection policy
 - There will also be jobs falling within the current grade boxes which are referred to as 'amber or white circles'. They should be carefully checked as part of the equality impact assessment to ensure no inequalities have been introduced with the new pay and grading structure
 - Lastly, pay modelling software will calculate the future cost of green, amber or white and red-circled jobs, both for the current year and for future years.
- 5.33 Consideration should also be given to differentials, both for salaries as well as JE points, and to grade boundaries, and potential overlaps between grades (see 5.25 above). The starting salary for the starting grade should align with the national pay spine and / or the national minimum wage / national living wage, the Living Wage Foundation living wage; or the London living wage. The minimum wage will of course impact on the whole pay structure which, when designed and implemented, should be sustainable and robust enough to absorb any unexpected movement in the minimum wage level.
- 5.34 These issues should be discussed and agreed with the joint steering group.

Example of a scattergram diagram with a line of best fit:



5.35 All pay and grading options considered as part of the modelling process should be subject to equality impact assessment, for example, to ensure that grade boundaries are not drawn in such a way as to place jobs traditionally performed by women just below the points cut-off for the higher grade.

Pay and Grading Costs

5.36 As mentioned earlier, there will be additional costs arising from implementation of the results of the review, including on-costs such as pension and National Insurance contributions. Consequently, the costs of proposed structures will be a major factor in the pay modelling process and subsequent negotiations on implementation.

5.37 To assess the full effect of the changes, cost estimates should include a financial assessment of the impact over a number of years, including legitimate pay protection and pay progression.

Equality Impact Assessments and Equal Pay Audits

5.38 It is important that any new pay structures and pay-related allowances are subject to thorough equality proofing. This can be achieved by carrying out an Equality Impact Assessment (EIA) of the proposed new arrangements for employees' pay and grading. It also ensures that MATs can show how their new pay structures were equality checked if this should become necessary.

5.39 In relation to pay and grading structures, the essential difference between an EIA and Equal Pay Audit (EPA) is that an EIA is carried out on proposals for a new pay and grading structure (particularly as they affect employees doing equal work), while

an EPA is a check on the pay of employees doing equal work by gender (and other protected characteristics, as agreed) at a selected point in time.

- 5.40 An EPA should be carried out no later than a year after the implementation of the new structure and at regular intervals thereafter.
- 5.41 For more information: Green Book Part 4.10: Equal pay audits; Green Book Part 4.11: Equality impact assessments.

Other Pay Elements

- 5.42 It is essential that the MAT pay and grading review include a thorough review of all pay elements, including payments linked to performance, market supplements, premium payments and payments-in-kind. (The EHRC has published a Data required checklist - see below for more information.)

Contractual Benefits

- 5.43 The Equality Act 2010 covers not only pay, but also all contractual terms and conditions of employment including sickness benefits, annual leave and working time. An equal pay claim can be made based on a comparison of any term in the employee's contract with the equivalent term in her / his comparator's contract. Such comparisons are made on a term-by-term basis, rather than by taking the contract as a whole. Each element of remuneration should be considered separately: it is not sufficient to only compare total pay.
- 5.44 Where MATs have inherited staff whose terms and conditions are no longer TUPE-protected, 'pre-single-status' contractual differences may still exist as a result of locally determined conditions of service, for example, additional leave for employees that is linked to grade. Where applicable, the review of pay and grading structures should incorporate an examination of these benefits to ensure they are non-discriminatory, and that single status is implemented in full.

Premium and other Additional Payments

- 5.45 An EIA of any proposals for change in relation to premium and other additional payments should be undertaken. This should detect whether there may be an adverse impact on a particular group, such as female staff who work part-time or male employees who receive overtime payments.

For more information on other pay elements and contractual benefits to include in an equality impact assessment / equal pay audit, see EHRC [guidance](#) Information needed and tools available: Link 1.1 Data required checklist; and [Establishing the causes of any significant gender pay differences](#) and assessing the justifications for them: Gaps in other pay elements.

Market Supplements

- 5.46 In respect of MATs that do not use market rates to determine base pay, pay arrangements should generally be set at a level that does not reduce the pay line. This will assist in recruiting and retaining employees, minimising the need to use market pay supplements. However, there may be a small number of jobs for which

it is not possible to recruit and / or retain employees at the job-evaluated rate, because of local or national shortages. In these circumstances it may be necessary to consider the payment of market supplements. Arrangements to pay market supplements should:

- be based on clearly evidenced recruitment and / or retention problems
- have clear, transparent and fair criteria for their application
- ensure that market salary testing uses appropriate market comparators for the particular post(s)
- apply to existing as well as newly recruited post holders in the same job
- ensure that the 'job evaluated' grade and any additional market supplement are clearly identified, shown as a separate allowance to the pay / grade determined by JE, and understood by employees in receipt; and
- ensure that the contractual terms of future payments are sufficiently clear to enable the payments to be withdrawn if the 'market' changes.

5.47 MATs should also undertake regular equalities monitoring with union representatives of the outcomes of the application of market supplements, for example, gender monitoring of jobs in receipt of the payments.

5.48 Where market supplements are applied, they should be reviewed regularly to ensure that they are consistent with these criteria above. If current payments cannot be justified by reference to these criteria, these should be discontinued.

For more information: NJC Technical Note 15: *Market supplements*

6. IMPLEMENTATION ISSUES

Appeals

6.1 It is standard JE practice to allow appeals against an initial evaluation exercise on the grounds set out below, and to allow re-evaluations of jobs which have changed significantly since the initial evaluation.

6.2 Where individual contracts of employment incorporate Green Book provisions, 'an employee dissatisfied with the grading of their job is entitled to appeal for a reconsideration of the grading. Procedures will be agreed locally to deal with such appeals' (Green Book, Part 2, paragraph 5.3).

6.3 Grounds for appeal against an initial evaluation should include:

- The JE scheme has been wrongly applied; for example, factor levels have been wrongly allocated and / or the evaluation panel has failed to follow scheme guidance.
- The job information (e.g. the job description questionnaire) used for the evaluation did not provide complete information.
- The job has been incorrectly evaluated because it was matched against the wrong role profile or wrongly included in a cluster of generic jobs.
- It is believed that an equivalent job is more highly graded and paid. This ground allows for potential equal value issues to be resolved internally without recourse to litigation. Formal appeals on this basis should be exceptional as, at an

informal stage (see below), transparent JE and grading processes enable full explanations to be given of the grading of a post believed to be equivalent (in JE terms) to that of a dissatisfied jobholder.

- 6.4 Complaints or disagreements over the content of jobs / job descriptions and the appeals process itself (i.e. that the appeal has not been dealt with fairly) should be dealt with under the grievance / disputes procedure, not the appeals procedure.
- 6.5 It is strongly recommended that the MAT appeal procedure includes an initial informal review / appeal stage. This allows for any obvious errors in scoring jobs or allocating them to benchmark jobs / role profiles and misunderstandings to be addressed.
- 6.6 Typically, the procedure should comprise two levels of appeal within the MAT: the informal review stage and the formal stage of the appeal conducted by a panel.
- 6.7 MAT panel members must be trained in the JE scheme used by the MAT and JE best practice, as essentially their role is to check / review the evaluation and, where appropriate, to re-evaluate the job. Where computerised JE has been used, re-evaluations should be conducted using the computerised version.
- 6.8 The NJC JES guidance envisages that formal appeals will be undertaken by joint union-management panels. Panel members should not have been directly involved with the evaluation of the job being appealed.
- 6.9 There may be circumstances in which it is agreed that the MAT appeal procedure should have an external or independent element. This could be met, for example, by appointing a suitably qualified, independent person to sit on the formal appeals panel as a chair or assessor, or by arranging for a local authority or another MAT appeals panel to conduct second-stage MAT appeals. Where appeals involve external organisations or individuals, it is imperative that they are knowledgeable about the JE scheme used; and that they apply the MAT local conventions in reviewing and / or re-evaluating jobs.
- 6.10 NJC Technical Note 9 gives detailed information on procedural issues including the timing and timescales for appeals; information to be provided for formal appeals; size, composition and chairing of appeal panels; and appeal record keeping and monitoring.

For more information: Green Book, Part 4.3: Guidance on appeals; Technical Note 9: *Appeals, reviews and ongoing maintenance*.

Pay Protection

- 6.11 The pay and grading review process may create different impacts on different occupational groups. In a limited number of cases downgrading may arise from the removal of any anomalies found in the pay and grading system, where previous pay rates are above the revised rate for the job. In such cases pay protection should be considered to ease the transition to the new pay and grading system. If so, legal advice should be taken on its use.

- 6.12 Protection arrangements must not perpetuate long-term unequal pay for jobs that have been assessed as of equal value under the JE scheme. Such an outcome may lead to an equal pay claim. In order to avoid liability for such a claim the employer may ultimately need to justify the use of the protection arrangements, by showing that its use is a proportionate means of achieving a legitimate aim. In this context proportionate relates to all of the circumstances, but in particular the duration of the protection.
- 6.13 Pay protection should not apply to new employees. Any protection arrangements dealing with past pay discrimination should be time-limited. Pay protection arrangements in this case should strike the right balance between mitigating the impact on those who have been downgraded and the achievement of pay equality as soon as reasonably possible. Not all pay differences are based on discrimination.

Sharing Information

- 6.14 At the conclusion of the pay and grading review process, the steering group should consider the sharing of JE outcomes. Deciding not to share information can create unnecessary problems, and sometimes scepticism, because of perceptions about secrecy. It may also lead to protracted discussions that waste time and resources because such problems then have to be addressed.
- 6.15 To avoid unnecessary delays and difficulties, the NJC recommends that as much information as possible should be shared to keep employees informed about the process and any proposals that emerge. As a minimum, we recommend that the following information should be shared with the employee:
- The job information on which the JE outcome is based;
 - The rank order of jobs together with the points for each post should be published;
 - Individuals should know the JE outcomes for their post; and
 - (when the grade and salary structure is published) the JE points should be included so all employees can see how grades have been designed and points allocated
 - The impact on their pay and allowances.

Consulting on a Package

- 6.16 Once there is a definite proposal for a new or revised pay structure, there should be formal consultation with staff in line with established MAT procedures. We recommend that this should be undertaken as a joint process wherever possible and consultation processes and procedures should be established as a priority if they do not already exist.
- 6.17 There is a responsibility on both employers and trade unions to be able to demonstrate that thorough, structured consultation has been undertaken and there is a legal obligation to publicise the full package openly and transparently.
- 6.18 As mentioned earlier, the unions representing support staff will consult their members on the employer's offer, typically through holding a consultative ballot. The MAT will need to allow sufficient time and resources for this to be facilitated.

- 6.19 If differences or disputes occur between MAT union representatives and MAT management during negotiations over the employer's offer (or at any stage during the review) that cannot be resolved internally, there are sources of help available, including regional / national unions and employers' organisations, and ACAS.

For more information see: [ACAS Dispute Resolution](#)

Moving to the New Pay Structure

- 6.20 In equal pay terms, those who are upgraded under any revised structure should in most cases be moved immediately onto their new grade from the previous one, even where the pay difference is substantial. However, in a limited number of cases phasing in the package over a limited period may be permissible. In these circumstances, the substantive grade may be achieved by a period of transitional arrangements, using accelerated increments for gainers. New starters should be aligned to the relevant phase. This raises many of the same issues as apply to the use of pay protection and therefore legal advice should be taken on any such proposal.
- 6.21 In any event, if it has been agreed to phase in the new pay structure, the MAT must ensure that any employees who have been upgraded as a result of the exercise understand that they will not gain their full entitlements immediately and know how and when they will move to their substantive grade.
- 6.22 It is also important to ensure that any employees who have been graded lower or have lost money they previously received (such as a supplement) understand what they will lose and how it has come about, together with any protection arrangements that may have been agreed.

Contractual Implications

- 6.23 Once the pay and grading review has been finalised the organisation should take the appropriate measures to incorporate the changes into individual contracts of employment. What these are will depend on the details of the individual contracts, for example, whether local collective agreements are automatically incorporated.
- 6.24 For more information on contractual change in regard to term-time only staff, see Green Book, Part 4.12: Term-time only employees.

7. Glossary

Appeals procedure

A process jointly agreed at MAT level which enables individual job holders to contest the grading of their job after a pay and grading review, or if the job has changed substantially since an initial evaluation. Grounds for appeal will be specified in the procedure section. Appeals processes typically involve two stages: an informal stage, involving a discussion with a job holder to answer queries and explain the evaluation score / grading of the job; and a formal stage which involves a re-evaluation of the job.

Benchmark jobs / benchmark sample

Terms used for representative jobs drawn from across all levels of the organisation's structure and geographic locations in which school support staff work. The size of the sample will depend on the number of employees and possibly the geographic spread of schools within the MAT.. As a rule of thumb, the sample should be no fewer than one-third of MAT support staff roles.

Consistency checking / moderation

Terms used to check the results of a JE rank order, usually carried out by a joint team including trade union and organisation representatives. The team will check for consistency both within job family hierarchies as well as across different disciplines / departments within the organisation. Evaluations found to be inconsistent may not be incorrect but should always be investigated.

Conventions, local and national

Conventions are essentially rules that help evaluators interpret the wording of JES factor definitions. The NJC JES has 'national conventions' (i.e. factor guidance notes, or in Gauge+ software, 'help text'). National conventions cannot be changed at local level. However, because the NJC JES was designed to evaluate a wide range of jobs in different organisations, it allows for 'local conventions' (local rules) to be agreed and added to the 'national conventions'. Local conventions might apply for example to the size of budgets, or bandings of the number of staff supervised. Conventions enable interpretation of the wording of JE factors (and questions and answers in Gauge+) to be applied consistently to all evaluations in the organisation.

Evaluation panel(s)

A small team (or teams) drawn from MAT management and union representatives, who have been selected and trained for the role, whose task is to evaluate the MAT support staff jobs using the job information that has been gathered, in accordance with the scheme guidance. (Moderation Panels are necessary where evaluations are carried out by a job analyst using Gauge+ or other JE software.)

GLPC JE scheme

A JE scheme developed by the Greater London Provincial Council to evaluate jobs (below executive level) in local government and related organisations.

Grade

Either a 'spot' salary, where each grade is associated with a single pay rate, or salary scales, consisting of a range of pay points for each scale allowing for (typically) incremental progression i.e. an annual uplift in salary (in steps 'increments' to the grade maximum) in recognition of continuing service and satisfactory performance

Grades (Career Grades)

Provide a means of enabling progression within or through a grade structure or job family hierarchy. They are generally associated with professions or careers within which the acquisition of competence and skills add to the employee's potential to contribute to the organisation.

Grades (Broad-banded structures)

Have a wide range of points in each grade. They are generally associated with flatter organisational structures and may allow greater pay flexibility and lateral career moves.

Grades, narrow

Generally a small number of grades of between seven and 12 that allow for incremental progression and smaller differentials between grades.

Green Book

The local government services national agreement on pay and conditions of service.

Job analyst

In organisations using computerised JE this refers to the the person interviewing the job holder and operating Gauge+. The role requires three core attributes: interviewing, analysis and writing skills. In this sense, the job analyst is also the 'job evaluator' (see below). In organisations that do not use computerised JE, 'job analyst' can refer to the person[s] who interview job holders to gather information for evaluation panels (see above).

Job evaluator

In organisations that evaluate jobs manually (i.e. do not use computerised JE), this term usually refers to members of evaluation panels (see above). It may also refer to those involved in the process of job matching (see below).

Job description

A summary of the main responsibilities of the role, including knowledge and skills that are required of the role.

Job matching

Matching of jobs against for example the school and other role profiles (see below). Used mainly for 'non-benchmark' jobs, it is a form of evaluation and therefore it must be carried out analytically, i.e. on the basis of a factor by factor comparison. (For more information, see Technical Note 16.)

JE outcomes

The results of an evaluation exercise (by evaluation panels or through a computerised system), one of which is a rank order of jobs that have been evaluated (ranked in order of their JE points score).

Line of best fit

The term used to describe a line drawn through a scatter plot of data, in this case JE data, that best expresses the relationship between these JE point scores. See also Regression Analysis below.

Maintaining JE

The term used to describe the maintenance of a pay and grading scheme, including pay policy, evaluation of new jobs, payment of annual increments etc. For more information, see Technical Note 14.

Market supplement

An additional element of salary added to base pay to reflect labour market pressures for certain skills and / or disciplines.

Model school support staff role profiles

59 roles in five job families applicable to all types of schools – profiles provide indicative evaluations of school roles employing the NJC 13-factor scheme.

National Joint Council (NJC) for Local Government Services

The national negotiating body for local government services, comprised of employers' representatives, (from local government bodies in England, Wales and Northern Ireland) and trade union representatives (from GMB, Unite, and UNISON).

National Joint Council (NJC) pay spine

Jointly negotiated spinal pay points, in its most recent iteration allowing for headroom for future increases in the National Living Wage. A spine of pay points on to which the employee is placed resulting from the je process.

NJC JE scheme (JES)

13-factor scheme jointly agreed and introduced as part of single status implementation in local government organisations.

NJC JE technical notes

Guidance issued periodically by the NJC to support users of the NJC JES. The notes provide detailed information on topics relating to JE and JE implementation. (Examples are mentioned in this guidance.)

Objective justification –

Arises where an employer puts forward a 'material factor' to explain the difference in pay between the claimant and her comparators. The material factor is not directly sex discriminatory, but if the claimant establishes that she and other women doing equal work are put at a particular disadvantage compared to men doing equal work, the employer will have to show 'objective justification' for its actions to defeat the equal pay claim. The employer can show such justification if the pay practice / criterion / provision corresponds to a real need on the part of the employer; is appropriate with a view to the objective being pursued; and is necessary to achieve that objective.

Pay and grading structure

The set of grades and associated pay points / salary scales used in the organisation or for particular groups of employees within the organisation. A new or revised pay and grading structure is the end product of a 'pay and grading review' comprising the JE exercise, pay modelling EIA (see above) and negotiations between management and union representatives.

Pay Policy Line

The organisation's pay rate or level set for each grade or band compared with the NJC pay spine or the pay rate or band set by the labour market; typically the comparison is to the

median of market pay levels but it could also be to the upper quartile or lower quartile of market pay levels. The two pay policy lines are typically compared in a graph (see pay modelling section).

Pay modelling

A process which enables a cost model to be developed of the pay and grading outcome. Using Excel or pay modelling software, different options for a new / revised pay and grading structure can be modelled, which link the 'rank order' of JE scores with employees' salaries and other additions to pay, as well future costs over several years.

Pay progression

Arrangements whereby individual employees' base pay can be increased within a grade. Separate from nationally negotiated pay increases, progression can be linked to annual increments or alternatively to a performance review, for example.

Pay protection

Applied to 'red-circled' jobs (see 6.11) whereby, as a result of the pay and grading review, an existing employee's salary (and the job's previous JE score) may be higher than the new JE score and proposed grading of the job. The salary is protected for a period which will depend on the negotiated pay protection policy.

Regression analysis

Is a predictive modelling technique which investigates the relationship between two variables: first, the JE scores and the second, current basic salary of those jobs that had been evaluated. See page 22 for the scatter diagram showing this relationship and a 'line of best fit' which enables options to be drawn for grade boxes showing a minimum and maximum for the width of grades as well as salary scales or bands .

Steering group

The joint group of managers and trade union representatives at MAT level leading the pay and grading review.