

# National Joint Negotiating Committee (NJNC) – Role Analysis Protocol

## 1 Introduction

This protocol document is to be considered an addendum to the NJNC National Role Evaluation Process and where any statement contradicts the National Process, this protocol document carries precedent and should be considered an update to the National Process.

### 1.1 Definitions

**NJNC STS:** The National Joint Negotiating Committee Side Table Support.

**NJNC JEWG:** The National Joint Negotiating Committee Job Evaluation Working Group.

**NJNC JEWG – Review Panel:** A sub-group of the NJNC JEWG comprised up to four representatives, two from each side to consider second scores that are not verified, general consistency of scoring and emerging rank orders and to agree joint communication to support role analysis.

**NRPA:** The National Recognition and Procedures Agreement

**FEDRA:** The Further Education Development and Role Analysis Scheme.

**ECC:** Educational Competencies Consortium Ltd.

## 2 Project Participants

### 2.1 NJNC JEWG

The working group is responsible for the day to day project management of the delivery of the National Evaluation Process.

### 2.2 NJNC STS

The NJNC STS is responsible for the delivery and implementation of the National Scheme of Job Evaluation for support staff.

### 2.3 Designated Secretaries

The nominated Management and Staff Side Secretaries to the NJNC JEWG represent the joint Project Managers.

### 2.4 Project Coordinator

The Colleges Scotland Project Coordinator provides the administrative support for the project team.

### 2.5 Role Analysts

The nominated team of trained Role Analysts comprise sector employees released for duty under a formal release agreement. Role Analysts operate in one of two capacities:

- First Scorers

- Second Scorers

All Role Analysts may be requested to operate in both first and second score capacity. However, no Role Analyst can operate as first and second scorer for the same role.

### 3. Protocol

#### 3.1 Role Allocation

3.1.1 The Designated Secretaries will agree and instruct the Role Analysts on the order of evaluation. This will be done monthly in conjunction with the Project Coordinator. Summary spreadsheet extracts incorporating college name and role code will be provided to each analyst one week in advance of activity. In addition, electronic copies of all organisational charts will also be provided for allocated colleges together with the FEDRA questionnaire and notes for guidance as developed.

3.1.2 All role analysis is undertaken in both individual and paired environments. The Designated Secretaries will confirm the role analysis pairings two weeks' in advance and for the month ahead.

3.1.3 The Project Coordinator will manage any day to day amendments to the schedule responding to declared sickness, annual leave or other required changes to the monthly plan.

#### 3.2 First Scorers

3.2.1 Having received the role allocation, on an individual basis, each analyst will undertake the following actions:

3.2.2 Roles will be evaluated in the order provided by the role allocation spreadsheet.

3.2.3 On an individual basis, the analysts will log on to the FEDRA system using the access details provided by the Project Coordinator and select '**Role Search**'. The appropriate role code will be entered into the '**Search**' box and selected using the blue arrow.

3.2.4 Navigate to the '**Documents**' tab and download the role outline questionnaire and job description available.

3.2.5 On an individual basis, Role Analysts then select the '**Scores**' tab and select '**New Score Record**', entering their name in '**Name of Scorer**', and select '**Role Status – First Score**' and reason as '**First Panel**'. Select '**Blank Score**' and '**Confirm**'.

3.2.6 Each individual panel member will proceed to score each role individually referencing the FEDRA questionnaire and notes for guidance.

3.2.7 Each analyst will proceed through each question adding notes as required. Once concluded select '**Go to Score Results**'.

3.2.8 Check and review any '**Scoring Conflict**' advice editing question entries if required. Select '**Back to Role**' when complete.

3.2.9 Each individual panel member will proceed to score all allocated roles.

3.2.10 Any analyst who is unable to score any part of the questionnaire due to lack of evidence or requiring clarification is required to submit a '**Role Outline Clarification**' form as provided at **Appendix 1**. This will be completed by entering the appropriate question that requires an answer against the relevant FEDRA element and then submit by email to the Project Coordinator immediately on consideration of the individual role evaluation.

The Project Coordinator will collate the submitted queries until all allocated roles have been processed on a weekly basis.

These will thereafter be provided to the relevant college HR strategic representative by email who will be requested to coordinate a response to the issues within one week. The returned submission will be in PDF format and emailed to the Project Coordinator. The Project Coordinator will upload the appropriate clarification form to the FEDRA system as required

and notify the analysts as appropriate that a response is available. Role Analysts will then complete the allocated evaluation accordingly. When completing the forms, in circumstances whereby, despite best endeavours, agreement cannot be reached between employees and line managers, advice should be sought from the Joint Chairs of the NJNC JEWG.

- 3.2.11 The individual analysts should then conclude their allocated evaluation activity. In exceptional cases, if the additional evidence remains insufficient the Role Analyst(s) will contact the Designated Secretaries for additional clarification.
- 3.2.12 Each confirmed pair of analysts will arrange to meet in person or via 'Zoom' video conference facility and access the FEDRA system using the login details provided by the Project Coordinator and select '**Role Search**'. Working through the allocated list, the appropriate role code will be entered into the '**Search**' box and selected using the blue arrow.
- 3.2.13 Navigate to '**Documents**' tab and download the role outline questionnaire, job description and any additional evidence available.
- 3.2.14 Navigate to the '**Details**' tab.
- 3.2.15 Enter details as follows:

#### **Basic Details**

First Score Panel Reference from the available 'drop down' options. Each panel combination is represented by Role Analyst initials in combination.

#### **Custom Fields**

Enter date of first scoring.

- 3.2.16 In the panel setting, select '**New Score Record**', entering their joint name in '**Name of Scorer**', and select '**Role Status – First Score**' and reason as '**First Panel**'. Select '**Copy From an Existing Score Record**' and choose either score available from the individually evaluated list and '**Confirm**'.
- 3.2.17 Select '**Compare**' and enter the role code in the search box. Use the '**Check Box**' to select the alternative panel score.
- 3.2.18 Proceed through the questionnaire amending only the options where a variance is noted. Amend question answers and update notes if required. Once concluded select '**Go to Score Results**'.
- 3.2.19 Check and review any '**Scoring Conflict**' advice editing question entries if required. Select '**Back to Role**' when complete.
- 3.2.20 Select '**Details**' and change '**Custom Fields**', '**First Score Status**', and change to '**Agreed**' or '**Not Agreed**' as appropriate and '**Save**'.
- 3.2.21 Return to Step 11 for next evaluation.

### **3.3 Second Scorers**

- 3.3.1 Having received the role allocation, on an individual basis, each analyst will undertake the following actions.
- 3.3.2 Roles will be evaluated in the order provided by the role allocation spreadsheet.
- 3.3.3 On an individual basis, the analysts will log on to the FEDRA system using the access details provided by the Project Coordinator and select '**Role Search**'. The appropriate role code will be entered into the '**Search**' box and selected using the blue arrow.
- 3.3.4 Navigate to '**Documents**' tab and download the role outline questionnaire, job description and any additional evidence available.

- 3.3.5 On an individual basis, Role Analysts will select '**New Score Record**', entering their name in '**Name of Scorer**', and select '**Role Status – Second Score**' and reason as '**Second Panel**'. Select '**Blank Score**' and '**Confirm**'.
- 3.3.6 Each individual panel member will proceed to score each role individually referencing the FEDRA questionnaire and notes for guidance.
- 3.3.7 Each analyst will proceed through each question amending both options and notes if required. Once concluded select '**Go to Score Results**'.
- 3.3.8 Check and review any '**Scoring Conflict**' advice editing question entries if required. Select '**Back to Role**' when complete.
- 3.3.9 Each individual panel member will proceed to score all allocated roles.
- 3.3.10 As an evaluation panel, meeting in person or by video call, the group will access the FEDRA system using the login details provided by the Project Coordinator and select '**Role Search**'. The appropriate role code will be entered into the '**Search**' box and selected using the blue arrow.
- 3.3.11 Navigate to '**Documents**' tab and download the role outline questionnaire, job description and any additional evidence available.
- 3.3.12 Navigate to the '**Details**' tab.
- 3.3.13 Enter details as follows:

#### **Basic Details**

Second Score Panel Reference from the available 'drop down' options. Each panel combination is represented by Role Analyst initials in combination.

#### **Custom Fields**

Enter date of first scoring.

- 3.3.14 On a panel basis, panels will select '**New Score Record**', entering their joint name in '**Name of Scorer**', and select '**Role Status – Second Score**' and reason as '**Second Panel**'. Select '**Copy From an Existing Score Record**' and choose either score available from the list and '**Confirm**'.
- 3.3.15 Select '**Compare**' and enter the role code in the search box. Use the '**Check Box**' to select the alternative Role Analyst score.
- 3.3.16 Proceed through each question amending both options and notes if required. Only responses where there is a variance should be subject to review. Once concluded select '**Go to Score Results**'.
- 3.3.17 Check and review any '**Scoring Conflict**' advice editing question entries if required. Select '**Back to Role**' when complete.
- 3.3.18 Select '**Details**' and change '**Custom Fields**', '**Second Score Status**', and change to '**Verified**' or '**Not Verified**' as appropriate.

### **3.4 First/Second Score Variance**

- 3.4.1 Where there are differences between first and second scoring panels which has resulted in a different overall score and/or element level assessments for the role, a discussion will take place between first and second scorers to discuss the evaluation variation. The second scoring panel however has authority over the first score evaluation outcomes and will represent the final score. The NJNC JEWG Review Panel will consider significant variation

in scores and direct that in such cases and in the opinion of the Review Panel, all Role Analysts will arrange to meet (video call or in person) to discuss the variance and agree the appropriate questionnaire responses.

- 3.4.2 Where first/second variances occur and at the group discussion, all analysts should access the FEDRA system but only one should be nominated as the user who amends any answers and notes.
- 3.4.2 Second score panels should not change '**Second Score Status**' to '**Verified**' until the discussion has concluded. Following collective review agreement, the second score panel will change the status to '**Verified**'.
- 3.4.3 The second score panel score record will be referenced as a collective evaluation and reviewed accordingly, amending questionnaire options and notes if required. Only responses where there is a variance should be subject to review.
- 3.4.4 If following review, the panel participants cannot reach agreement, the '**Second Score Status**' should be set to '**Not verified**'.

### **3.5 NJNC JEWG Review Panel**

- 3.5.1 For roles that are 'not verified' at second scoring stage, The NJNC JEWG will instruct additional re-consideration of evaluation outcomes. The group will direct the sub-group comprised up to four representatives, two from each side to address the disagreement. This sub-group will be agreed at a full NJNC JEWG meeting and address the specific area of disagreement, accessing the FEDRA system to amend responses as required.
- 3.5.2 The panel may provide additional communication relating to clarification of evidence including joint guidance and interpretation advice some of which would be as a result of second score roles that are not verified.

### **3.6 NJNC JEWG – Review Panel – Second Scores Not Verified**

- 3.6.1 The nominated sub-group will meet in person at pre-agreed dates/times and venues. The list of roles for consideration will be provided by the Joint Project Managers ahead of the meeting. One of the group will log on to the FEDRA system using their access details and select '**Role Search**'. The appropriate role code will be entered into the '**Search**' box and selected using the blue arrow.
- 3.6.2 Navigate to '**Documents**' tab and download the role outline questionnaire, job description and any additional evidence available.
- 3.6.3 Navigate to the '**Details**' tab.
- 3.6.4 The group will select '**New Score Record**', entering '**NJNC Review**' in '**Name of Scorer**', and select '**Role Status – NJNC JEWG Review**' and reason as '**NJNC JEWG Review**'. Select '**Copy From an Existing Score Record**' and choose either second score available from the list and '**Confirm**'.
- 3.3.5 Select '**Compare**' and enter the role code in the search box. Use the '**Check Box**' to select the alternative Role Analyst score for both second scores.
- 3.3.6 Proceed through each question amending both options and notes if required. Only responses where there is a variance should be subject to review. Once concluded select '**Go to Score Results**'.
- 3.3.7 Check and review any '**Scoring Conflict**' advice editing question entries if required. Select '**Back to Role**' when complete.
- 3.3.8 Select '**Details**' and change '**Custom Fields**', '**NJNC JEWG Status**', and change to '**Review Complete**'.

## **4. FEDRA Scheme Integrity**

- 4.1 The providers of the NJNC National Role Evaluation System are ECC Ltd. The assurance of evaluation scheme integrity is critical to the successful delivery of the joint process.
- 4.2 Additional Role Analyst refresher training will take place where there is greater than six-week gap between initial training and Role Analysis activity. This will be delivered by a nominated ECC consultant.
- 4.3 All analysts will be supported by a nominated ECC consultant for one day of activity in the panel setting. Additional supported activity may be required in consultation with the Designated Secretaries.
- 4.4 Any amendment to content of the Intellectual Property of ECC, namely the 'FEDRA Questionnaire (Re-Issued February 2018)' and 'Notes for Guidance (Amended February 2018)' will be subject to review and agreement by ECC to ensure scheme integrity is maintained. This review will be provided to the Designated Secretaries
- 4.5 To support and enable Role Analysts, a sample of agreed 'first score' roles will be scored independently by a nominated ECC consultant to ensure a consistency of interpretation with any matters requiring consideration brought to the attention of the Designated Secretaries. The number of sampled roles will be subject to agreement between the Designated Secretaries and ECC. No sample scoring or advisory support to second score panels is required.
- 4.6 The Designated Secretaries, NJNC JEWG or NJNC JEWG – Review Panel may issue additional communication to support Role Analysis as required.

## **5. Administration**

- 5.1 The Project Coordinator provides the main administrative link between the Designated Secretaries and the Role Analysts for the duration of the project.
- 5.2 The Project Coordinator is responsible for work schedule notification to Role Analysis and recording of all activity as per the work schedule directed by the Designated Secretaries.
- 5.3 On a monthly basis in advance, roles for evaluation are agreed by the Designated Secretaries and provided to the Project Coordinator for notification to each Role Analyst. This will be recorded as required on an appropriate database.
- 5.4 The Project Coordinator will monitor progress by accessing the FEDRA system and recording activity against the allocated roles, reporting progress to the Designated Secretaries on a weekly basis.
- 5.5 All Role Analysts are required to contact the Project Coordinator to confirm all approved annual leave requests once approved by their college.
- 5.6 If possible, all Role Analysts should endeavour to notify the Project Coordinator in cases of sickness absence along with their normal college notification processes.
- 5.7 All expense claims to be submitted as per each appropriate college procedure are required to be confirmed as appropriate by the Project Coordinator. Each college will be requested to receive confirmation from the Project Coordinator that the submitted claims are appropriate according to the work schedule by email.

# Appendix 1

## Role Outline Questionnaire Clarification

Please provide additional evidence in answer to the following questions/points of clarification.

This form should be completed by the role holder and their line manager. The role of HR is to coordinate the completion and submission of the form.

<b>Role Title</b>		<b>Role Code</b>	
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<b>Element</b>
<b>Oral Communication</b>  Question:  Evidence:
<b>Written Communication</b>  Question:  Evidence:
<b>Teamwork and Motivation</b>  Question:  Evidence:
<b>Liaison and Networking</b>  Question:  Evidence:

**Service Delivery**

Question:

Evidence:

**Decision Making Processes and Outcomes**

Question:

Evidence:

**Planning and Organising Resources**

Question:

Evidence:

**Initiative and Problem Solving**

Question:

Evidence:

**Investigation and Analysis**

Question:

Evidence:

**Sensory and Physical Demands**



Question:

Evidence:

**Work Environment**

Question:

Evidence:

**Pastoral Care and Welfare**

Question:

Evidence:

**Team Development**

Question:

Evidence:

**Teaching and Learning Support**

Question:

Evidence:

**Knowledge and Experience**

Question:

Evidence:

**Additional Information**

<b>Name of Roleholder(s)</b>	
<b>Signature of Roleholder(s)</b>	
<b>Name of Line Manager</b>	
<b>Signature of Line Manager</b>	
<b>HR Department/Section Date of Submission</b>	