



# THE UNIVERSITY *of* EDINBURGH

## **Regrading of Professional Services Jobs**

### **1. Policy Statement**

The University is committed to equal pay for work of equal value. In line with business needs, we recognise that, over time, jobs can change to the extent that their grade may need to be reviewed. This policy explains how jobs are reviewed and regraded.

### **2. Scope**

This policy applies to all Professional Services jobs covered by the Administrative, Technical, Operational and General Grade Profiles. A separate Academic Promotions Policy is in place for staff covered by the Academic Grade Profiles.

The policy focuses on the requirements of the job, not the performance or potential of the job-holder. Guidance relating to outstanding individual performance or contribution is given in the Contribution Reward Policy.

### **3. Principles**

Regrading requests will be considered by Regrading Panels and in line with the following underpinning principles:

- 3.1 requests will be considered fairly and consistently
- 3.2 jobs will be regraded by a process of job matching to University grade profiles
- 3.3 job matching will be based on the knowledge, experience and skills set out in the job description
- 3.4 regrading reflects a permanent, business led change in the job.

### **4. Links to Other Relevant Policies and Guidance**

You may find it useful to refer to other relevant University policies and guidance documents which you can find on the [HR web pages](#):

[Academic Promotions Policy](#)

[Contribution Reward Policy](#)

[Conflict of Interest Policy](#)

[Grade Profiles](#)

[Job Description Guidance](#)

[Job Grading Policy](#)

[Job Description Template](#)

## **5. Policy History and Review**

Approval Date: March 2020

Approved By: HR Policy Development Group

Year of Next Review: 2023

## **Regrading of Professional Services Jobs Procedure**

### **1. Before submitting a request**

Before submitting a regrading request, the manager and job-holder must first discuss the changes to the job. The request can only progress if:

- the manager agrees that there is a business led and permanent change in responsibilities and in the knowledge, experience and skills required to do the job and that the increased responsibilities were performed for at least six months; regrading must not and cannot be used to recognise the personal performance or potential of the job-holder
- the relevant senior manager agrees that the changes to the role merit consideration for regrading
- at least 12 months have passed since the job was last submitted for regrading.

Where a job-holder feels that their job should be put forward for regrading but the manager does not agree, the job-holder should seek the advice of the relevant senior manager. If the senior manager confirms the decision of the manager, this will be explained to the job-holder, the job cannot be put forward for regrading. If the senior manager thinks there is a case for regrading, they will discuss this with the manager before confirming whether the job will be put forward for regrading.

Managers reviewing jobs as part of a departmental restructure, must seek advice from their HR Partner before continuing to follow this policy.

#### **1.1 Hybrid Roles**

Hybrid roles are those jobs that involve both academic and professional services activities. If the regrading request refers to a job that could be defined as hybrid, the manager must work with the job-holder to determine how much of the role can be categorised as academic.

If less than 50% of the role is dedicated to academic activity, a regrading submission should be made in line with this procedure and will be considered by the relevant Professional Services Regrading Panel. This Panel will include a representative from the relevant College academic promotions panel, who can provide input regarding the academic elements of the application.

If more than 50% of the role is dedicated to academic activity, the job-holder should apply for promotion using the Academic Promotions policy. The application will be considered by the relevant School and College academic promotion panels in the normal way but the panels will also include a representative from professional services who can provide input about the non-academic elements of the application.

If the job-holder makes an application for promotion through the Academic Promotions policy, the manager cannot also submit the job for regrading through the Regrading of Professional Services Jobs policy.

## **2. Submitting a request**

Where the conditions listed above have been met, the manager should update the job description with input and agreement from the job-holder. Managers should refer to the Job Description Template and Job Description Guidance document for support on how to write the job description.

In addition to the updated job description, the manager must also prepare and submit the following to their HR Partner:

- an updated organisation chart for the department. The organisation chart must include the job titles (no names) and grades for each role within each team
- a completed Regrading Request form, which must explain the business led change in the job and include all required signatures
- a copy of the previous job description.

When close comparator jobs exist, managers can also submit the job descriptions for up to three jobs to aid the matching process.

The HR Partner will submit all of the required documents to the relevant College or Professional Services Regrading Panel.

### **3. Regrading Panels**

#### **3.1 Panel frequency and submission timelines**

There will be four Regrading Panels, one for each College and one for all Professional Service Groups. The panels will meet three times a year, normally in February, June and October.

Documents must be submitted to the HR Partner at least one month in advance of the meeting. Submission deadlines dates will be published on the Human Resources webpages. Late submissions will be carried forward to the next meeting date.

#### **3.2 Panel composition**

Regrading Panels will include:

- Panel Chair - respective College Registrar/Senior Manager for Professional Services Groups
- Secretary - HR representative
- At least two management representatives – one of which will be from another College/Professional Services Group to the Chair
- HR Partner
- Trade union representative.

The panel may also include representatives from functional areas such as: Research Support, Finance, HR, IT, to provide clarification and contextual information about jobs to the panel. Every effort will be made to ensure mixed gender panels.

Panel members must declare if they have a conflict of interest regarding any of the jobs submitted for regrading to the Panel Chair, who will determine how to proceed. This might mean that the panel member will not take part in the discussion about a particular job.

### **4. Panel Consideration**

Regrading panels will review requests for all grades, including jobs that may be upgraded from Grade 9 to Grade 10. The panel will review each regrading request and assess it against the criteria outlined in the Grade Profiles. Further information on the roles and responsibilities of the panel is available in the Regrading Panel Guidance document.

The panel must reach a consensus through discussion. They must agree that:

- a) the job should be assigned to a higher grade; or
- b) there is insufficient evidence to match the job to a higher grade.

The reasons for the panel's decision will be recorded during the regrading discussions.

## **5. Notification of outcome**

The panel Secretary will write to managers to confirm the outcome within two calendar weeks of the panel meeting. This will include summary feedback from the panel regarding the submission and, where relevant, the reasons for not matching the job to a higher grade. The manager will then inform the job-holder of the outcome.

The Secretary will also advise the HR Reward Team of the outcome of all regrading submissions.

If the regrading request is successful:

- the job will be assigned to the first spine point of the new grade. If the job-holder's previous salary in the lower grade was on a contribution point, they will receive one spinal point increase.
- the change in grade will take effect from the first of the month following the panel meeting. Backdating the effective date of the higher grade will not be considered.

If the regrading request is unsuccessful, the manager will discuss the summary feedback from the panel with the job-holder and decide whether or not there are grounds to appeal the panel's decision. Depending on the feedback from the panel, it may be more appropriate for the manager to submit a new regrading request at a later date when there is greater evidence of a change in job responsibilities.

## **6. Appeals**

### **6.1 Grounds for appeal**

An appeal can only be made on the following grounds:

- a) there was a procedural failing that affected the panel's decision; and/or
- b) there is clear evidence that the job should be matched to a higher grade.

## **6.2 Submitting an appeal**

To appeal the Regrading Panel's decision, the manager must send a completed Appeals Form to the HR Reward Team within four weeks of receiving the decision. Appeals cannot include any new information or new responsibilities that were acquired after submitting the original request.

Managers must:

- ensure that the form is completed in full
- submit the Appeals Form to the HR Reward Team
- copy the job-holder into the submission.

The HR Reward Team will acknowledge receipt of the appeal to the manager and their HR Partner within two calendar weeks.

## **6.3 Appeals Panel membership and operation**

The HR Reward Team will arrange the Appeals Panels, which, if required, will meet three times per year, normally in January, May and September. The Reward Team will set up an Appeals Panel which reflects the types of jobs to be considered and takes account of the make-up of the original Regrading Panel. For example, if all of the jobs are based within the Colleges, a cross-College Appeals Panel will be set up, with different panel members to those who attended the Regrading Panel. Every effort will be made to ensure mixed gender panels.

As a minimum, the Appeals Panel will include:

- Appeal Panel Chair - a senior University Manager
- Secretary - a member of the HR Reward Team
- at least two management representatives
- HR Partner
- Trade union representative.

Panel members must declare if they have a conflict of interest regarding any of the jobs submitted for appeal to the Panel Chair, who will determine how to proceed. This might mean that the panel member will not take part in the discussion about a particular job.

#### **6.4 Role of Appeals Panel**

The role of the Appeals Panel is to review the decision made by the Regrading Panel based on the information originally submitted. The panel will review the appeal submission and the original application for regrading, and will undertake their own job matching exercise.

#### **6.5 Appeals Panel outcomes**

The Appeals Panel will either decide to:

- a) confirm the original decision not to upgrade the job; or
- b) agree the role is at a higher grade and assign it to a higher grade.

The decision of the Appeals Panel is final.

#### **6.6 Outcome of the appeal**

The Secretary to the Appeals Panel will write to the manager and their HR Partner to confirm the outcome of the appeal within two calendar weeks. The manager will then inform the job-holder of the outcome.

Where an appeal is successful, the new grade will be backdated to the first of the month following the meeting of the original Regrading Panel.

If the appeal has been unsuccessful, the panel will provide the reasons for confirming the original decision.

### **7. Quality Assurance**

The HR Reward Team will organise and coordinate an annual quality assurance exercise for jobs from across the University. The Reward Team will:

- propose an appropriate sample size based on the number and types of jobs graded and regraded in the previous 12 months
- discuss and agree the sample size and profile with the trade unions
- convene a panel made up of staff experienced in job matching, including trade union representatives

–confirm the outcome of the exercise to the Heads of College/Professional Services.