

SECTION 2 APPENDIX B
MANUAL WORKERS JOB EVALUATION SCHEME
AND NOTES OF GUIDANCE

FACTOR 1 – SKILL

This factor measures the levels of experience, caring skills, formal training, manual dexterity, operating skills, teamwork skills, communicating and responding abilities, and literacy and numeracy which the job requires to be performed competently. These skills may equally well have been acquired in work or domestic environments or through formal study. It is emphasised that the levels cover the range of the normal skills demanded by the job, not the skills of the individual employee.

- Level 1** Skills consistent with the ability to use basic equipment, to follow simple oral and/or written instructions. (Minimal induction may be necessary.)
- Level 2** Skills consistent with basic experience/instruction of up to three months needed. The job requires the caring skills necessary to respond to the basic welfare needs of clients and/or to use simple mechanical equipment and/or materials. The ability to follow written and/or oral instructions may be required.
- Level 3** Skills consistent with experience or basic instruction of three months to one year needed. The job requires the caring skills necessary to respond to the more demanding welfare needs of clients and/or to use less simple equipment and/or materials, and/or to drive or use minor plant or machinery. An ability to keep basic official records (which may involve simple arithmetic) may be needed.
- Level 4** Skills consistent with experience of one to three years; or an appropriate recognised national qualification at normal level, or in-service training leading to a comparable level of skill; or successful completion of an apprenticeship needed. The job requires caring skills necessary to respond to the exceptional welfare needs of clients, and/or specialist driving skills or the ability to use plant or machinery, or equipment, resources and material of medium complexity/sensitivity. The ability to keep official records or undertake simple calculations may be needed.
- Level 5** Skills consistent with experience of more than three years; or an appropriate recognised qualification at a higher level, or in-service training of more than three years leading to a comparable level of skill needed. The job may require the ability to use major/sensitive/complex materials. It may also require the specialist caring skills necessary to respond to the exceptional welfare needs of especially dependent clients. The ability to prepare comprehensively written reports may be needed.

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FACTOR 2 – RESPONSIBILITY

This factor measures the specific responsibilities of the job for:-

- (a) people;
- (b) physical resources (including cash, plant, equipment, materials, buildings and their contents);
- (c) supervision of other employees.

Responsibility for People

This sub-factor measures the job's responsibility for people.

- Level 1** Responsibility involving the normal requirement to avoid causing inconvenience and hazard to people.
- Level 2** Shared responsibility for the physical, mental or social well-being of people who use, but do not have to rely on, council services.
- Level 3** Shared responsibility for the physical, mental or social well-being of people who rely on council services.
- Level 4** Individual responsibility for the physical well-being of people, reliant on council services, who are assigned to the care of the job holder.

Responsibility for Council's and Members of the Public's Physical Resources including Equipment, Plant, Buildings and Cash

This sub factor measures the job's specific responsibility for having charge of and the safe keeping of, physical resources.

- Level 1** Having charge of and responsible for the safe keeping of basic resources
- Level 2** Having charge of and responsible for the safe keeping of limited resources
- Level 3** Having charge of and responsible for the safe keeping of significant resources
- Level 4** Having charge of and responsible for the safe keeping of major resources

Responsibility for Supervision/Direction of Other Employees

- Level 1** No responsibility for any control, supervision or formal training of other employees.
- Level 2** Regular general direction (as to what task is to be performed, where and when) of one or 2 employees, or general direction on an occasional basis for more than 2 employees.
- Level 3** Regular general direction (as to what task is to be performed, where and when) of 3-10 employees, or detailed direction (as to what, where and when, but also how, the job should be performed) on an occasional basis for up to 10 employees.

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- Level 4** Regular detailed direction (as to what, where and when; but also how, the job should be performed) of up to 25 employees, or detailed directions on an occasional basis for more than 25 employees.
- Level 5** Regular detailed direction (as to what, where and when but also how the job should be performed) of more than 25 employees.

FACTOR 3 – INITIATIVE AND INDEPENDENT ACTION

This factor measures the degree and frequency of independent action, ie exercises of judgement, the making of decisions or the amount of planning which the job requires, and takes into account the degree of supervision required and the direction provided by the systems and procedures of the Council.

- Level 1** Required to follow instructions defining simple tasks in detail, minimal personal initiative required. Checks of performance provided.
- Level 2** Required to work from full/comprehensive instructions but also to make minor decisions involving use of some judgement. Problems referred to superior, but little close supervision necessary beyond that provided by the working arrangements and operating methods of the Council.
- Level 3** Required to perform a sequence of tasks/operations within recognised procedures or operating methods, but which leaves some room for independent action. Needs to respond independently, without recourse to a senior, to deal with unforeseen problems and circumstances.
- Level 4** Required, as a normal part of work content, to plan and progress a series of jobs within general guidelines, and to make frequent decisions involving the use of initiative and judgement without access to seniors.

FACTOR 4 – MENTAL EFFORT

This factor measures the degree and frequency of mental concentration, effort, attention, alertness and responsiveness required and the emotional demands made by the job.

- Level 1** Work requiring normal mental effort and general awareness.
- Level 2** Work requiring normal mental effort with short periods of concentrated mental effort.
- Level 3** Work requiring normal mental effort with lengthy periods of concentrated mental effort.
- Level 4** Work requiring prolonged periods of concentrated mental effort.

FACTOR 5 – PHYSICAL EFFORT

This factor measures the amount and continuity of physical effort required, for example, standing and walking, lifting and lowering, pulling and pushing, rolling and pressing, etc. It is emphasised this does not just mean strength.

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Level 1	Work requiring normal physical effort.
Level 2	Work requiring normal physical effort with periods of substantial effort; or normal physical effort occasionally in awkward postures.
Level 3	Work requiring substantial physical effort with short periods of intense physical effort; or normal physical effort regularly in awkward postures.
Level 4	Work regularly requiring intense physical effort; or lengthy periods of substantial physical effort in awkward postures.

FACTOR 6 – WORKING CONDITIONS

This factor measures the extent and frequency of exposure to disagreeable or unpleasant elements including, heat, cold and humidity, noise, fumes and smells, dirt, dust, oil, etc. Safety requirements are assumed to be met in all cases but the requirements of some jobs for protective clothing may create disagreeable or uncomfortable conditions.

Level 1	Generally working in favourable conditions, with minimal exposure to any disagreeable element.
Level 2	Generally working in favourable conditions, but with some exposure to one or more disagreeable elements.
Level 3	Generally working in an unfavourable or unpleasant environment. Or generally working in favourable conditions with some exposure to very disagreeable elements.
Level 4	Generally working in a very disagreeable or very unpleasant environment.

NOTES OF GUIDANCE

These Guidance Notes are designed to assist understanding of the job evaluation scheme. They should be used in conjunction with the factor descriptions.

1. SKILL

- 1.1 A useful way of looking at this factor is to see it as a 'stock' to be drawn on to perform the job competently. Some schemes distinguish between skill and knowledge but this scheme includes them within this one factor as the stock of abilities which are needed to do the job properly.
- 1.2 The broad categories of skill to be considered include:
 - (1) Manual skills, eg manual dexterity;
 - (2) Caring skills;
 - (3) The skills/abilities required to operate/use machinery, plant, equipment, tools, utensils, materials, etc;
 - (4) Communicating ability;
 - (5) The level of literacy and numeracy required;
 - (6) The skills/abilities to work effectively as a member of a team.

- 1.3 How often the skill is used is not important so long as the skill would be required at any time as part of the job's normal duties.
- 1.4 It is important to ensure that any skills which are not needed by the job are ignored. Thus a manual worker may be able to drive but if the job does not require the job holder to drive then that particular skill is irrelevant.
- 1.5 On the other hand, it is equally vital not to ignore skills which are not needed by the job but which may not always be obvious, eg a 'check out' assistant in a supermarket may require the skills of tact and diplomacy in dealing with customers. The job description has to be examined carefully to ensure that all the skills required by a job are fully drawn out and considered.
- 1.6 The skills required by the job may be acquired in many ways. Some may be learned before taking up the job, others may be gained through in-service training or formal education. All the skills required by the job should be considered irrespective of when they were gained. For example, caring and cooking and kitchen skills may not necessarily have been acquired in the course of paid employment or formal training, although they may have been acquired over a long period of practical learning.

References to experience in the factor descriptions are references to experience providing the necessary skills rather than to experience in the specific job itself.

Where time scales are used they are references to the length of time it would take an average worker, working full time at the task, to obtain the skills required.

This factor emphasises the skills required rather than the manner in which they were acquired.

- 1.7 When considering skills it is important not to concentrate solely on those measured by formal qualifications or periods of apprenticeship and training.
- 1.8 The level of skill has nothing to do with the scarcity of skill. For example, there may be many people with the ability to care for young babies but that does not make it any less important as a skill. On the other hand, very few people can walk on stilts, but that does not make it a necessarily more important skill. The only relevant consideration is the level of skill required by the job to do it properly.
- 1.9 In considering the caring skills required regard should be paid to the range of knowledge/experience required to provide the level and range of care required by the job.
- 1.10 An important aspect of communicating abilities is to listen in such a way as to understand quickly and respond sensitively and effectively to the needs of clients.
- 1.11 Communicating abilities include the need to respond to and/or give oral advice and/or instructions and/or to communicate with members of a working

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team or members of the public to ensure the job or jobs are performed satisfactorily.

Generally, regard should be had to the importance and complexity of the communications.

- 1.12 In considering the abilities required to operate equipment, etc, the complexity and difficulty involved in using the equipment or machinery is the determining factor rather than the size or cost of the equipment. However, sometimes big things may be complex.
- 1.13 The ability to keep records is a measure of the reading, writing and arithmetical skills required in the job. In determining which is the appropriate level, consideration should be given to the complexity of the records or reports. Also consider whether the reports provide factual information or whether they are more comprehensive, eg the reports contain assessments and recommendations for action to be taken. For the purposes of this scheme, all jobs are credited with the ability to complete personal time sheets, bonus sheets and job cards.
- 1.14 Two levels of national exam are referred to. Normal level and Higher level or their equivalent. A Normal level qualification is one made by a national examination or awarding body in respect of successful completion of a course involving 450-650 hours of study. Higher level would be defined as supplementary to and conditional on successful completion of Normal level.

Welfare – Means the physical, mental and social well-being of individuals or groups and may include an element of 'supervision'.

2. **RESPONSIBILITY**

- 2.1 Responsibility is an important part of many Council jobs, and may be exercised in a variety of ways. In order to give detailed consideration to this factor it has been sub-divided into:

Responsibility for People (eg, old people, adults, children, etc)

All factors and sub factors in this scheme are important. However, the sub factor 'responsibility for people' is particularly important. It is a new factor which was not in the 1969 Manual Workers Job Evaluation Scheme. Responsibility for people should be given as much consideration as the more traditional Responsibility for Resources.

Responsibility for Resources (eg, cash, buildings, etc)

Responsibility for Supervising other Employees

- 2.2 Whilst ultimate responsibility will usually rest with higher management, manual employees have their own specific responsibilities and it is these which this factor measures.
- 2.3 Responsibility should be distinguished from Skill, Initiative or Mental Effort required to exercise the responsibility. For example, a captain's responsibility

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for the ship is quite separate from the skill needed in navigation, initiative in avoiding danger or the mental alertness required on the bridge.

2.4 Responsibility under *both* sub factors, **Responsibility for People** and **Responsibility for Resources** can be measured in a number of ways and when considering which level of responsibility a particular job should have you should think about the following:

(a) The extent to which the job involves 'acting on behalf of the Service'.

(b) **Nature of the Responsibility**

(i) The nature of the **responsibility for people** may include, for example, caring, feeding, cleaning and physical or social care including the involvement with relatives and other caring organisations and acting of behalf of or in place of members of the public.

In short, any aspect of the physical, mental or social welfare of members of the public may be part of the responsibility of the job. The numbers of members of the public for whom the job is responsible is also a relevant consideration.

Inherent in the nature of the bulk of manual workers work is the fact that the public do have to rely on many of the services provided. However, responsibility for people measures the direct and active individual responsibility of the postholder for people in his or her care rather than any general reliance on the service. Therefore, where the responsibility is indirect, distant and passive, this should be taken into account in scoring the factor along with frequency and consequence of error.

(ii) The nature of the **responsibility for resources** may be the use of the resource in a safe manner or it may include its repair, maintenance and safe custody. All jobs have general responsibility for competent performance to ensure general safety of people. Regard should be paid to the value of the resources which include equipment, machinery, plant, tools, utensils, materials, buildings and their contents whether *belonging to the Council OR members of the public*.

(c) **DEGREE OF RESPONSIBILITY**

The degree of responsibility will include the frequency and duration with which the responsibility is exercised. This applies to both **responsibility for people** and **responsibility for the resources**.

The extent to which the job is individually accountable or the responsibility is shared with others (other jobs or members of the public) is also relevant. In some jobs the job holder has specific responsibilities for either *people* and/or *resources* specifically assigned to it whereas in others the responsibility is more obviously a shared task.

The circumstances of the responsibility for *people* is also an important consideration. For example, a job may carry more responsibility if members of the public are totally dependent on the job than if they have some more or less limited degree of choice.

(d) **CONSEQUENCE OF ERROR**

The primary objective of local government is to provide high quality services on which the public depend. In considering the degree of responsibility that any job holder may have for this objective consequence of error is a useful measure in relation to responsibility for both people and resources. The notion of consequence of error does not assume that the job holder normally makes mistakes but simply asks the question 'what happens *if* mistakes are made?'.

Consequence of error can be measured in at least three ways:

- (a) Inconvenience/cost to the service
- (b) Inconvenience/cost to the public
- (c) Inconvenience/cost to other employees

Inconvenience/cost to the service includes the effects on the quality of service provided, making the service incur extra expense, and also any damage to the service's reputation or standing in the eyes of the public. Extra expense could mean, for example, extra administration, more time and labour needed than would have been necessary to carry out the job.

Inconvenience/cost to members of the public includes the risk of death, accident, illness, injury or discomfort as well as making the public incur extra expense either in money, time or effort.

Inconvenience/cost to other employees means the risk of accident, injury, discomfort, illness or death to other Council employees as well as the risk of making other employees incur extra effort or time in rectifying the error.

There may be some overlapping of these consequences. Where there is a possible overlapping, the *combined seriousness of the consequences* should be the deciding consideration.

2.5 **Responsibility for supervision of other employees** is concerned with directing employees on what, where and how a task should be done. Some jobs will require more supervision than others. The levels of supervisory responsibility can be defined by reference to:

- The number of employees directed;
- The nature of direction;
- The frequency and duration of direction given. It does not, however, apply where informal guidance or assistance is given.

Where non-supervisory staff are formally involved in assisting in the training of trainees or apprentices this would be considered when examining the

nature of direction given. It does not, however, apply where informal guidance or assistance is given.

- 2.6 The numbers (in terms of full-timers) in the factor descriptions are intended as a guide only since the responsibility involved in supervising 20 part-time workers may not necessarily be the same as that for 10 full-time workers. All employees should be counted including, where appropriate, contractors' employees.
- 2.7 The nature of the supervisory responsibility should also be considered. For example, does it involve:
- Simple, brief, factual directions;
 - Simple, general directions;
 - Extensive general directions;
 - Extensive detailed directions;
 - Fully explaining exactly how a job should be done.
- 2.8 The following definitions may assist panel members in allocating jobs to various levels of responsibility.

Clients: Include children, adults, old people, ie anyone not an employee.

Major Resources: Major in this context means for example equipment, materials, buildings, plant, etc of a value greater than £50,000.

Basic Resources: Basic in this request includes brushes, mops and shovels, or their cash equivalent.

3 **INITIATIVE/INDEPENDENT ACTION**

- 3.1 Initiative/independent actions measures the scope for independent action, judgement and decision making required by the job.
- 3.2 The job may require the use of judgement on a wide range of matters, including for example:
- the order in which tasks are to be performed;
 - whether to deal with a particular problem which arises or to report it to the supervisor for somebody else to deal with;
 - methods of work to be adopted when carrying out a particular task.

Some decisions will be more important and complex than others; for example the order in which a window cleaner decides to clean the windows of a bungalow has little impact on the main objective of the job – ensuring all the windows are clean – and such a decision may therefore be unimportant and not particularly complex. Conversely a long distance lorry driver who regularly transports fresh foodstuffs across Europe may have to make decisions on routes, ferries, etc, which will have a direct and major effect on the successful completion, or otherwise of the job.

- 3.3 Some jobs may require the use of judgement and the taking of decision more often than others; often, occasionally, rarely and so on. The frequency of decision making and judgement is therefore an important consideration in this factor.
- 3.4 Account also has to be taken of the degree of supervision received by the job. However, certain jobs may be so simple that they require little judgement or initiative, and the work may not therefore require constant and close supervision. On the other hand some jobs requiring great use of initiative may also receive little supervision.
- 3.5 This factor therefore takes into account:
- (a) the kind of judgement and decision making the job requires;
 - (b) the frequency of the judgements and decisions; and
 - (c) the nature and closeness of the supervision required.
- 3.6 The factor levels generally go through stages from:
- (a) minimal initiative required;
 - (b) some use of judgement but in circumstances where comprehensive instructions are given;
 - (c) the exercise of judgement within a more general framework of recognised procedures;
 - (d) the planning and performing of a series of jobs which require frequent decisions to be made without any supervision.

4. **MENTAL EFFORT**

- 4.1 Mental effort measures the very wide range of non-physical effort including concentration and attention, vigilance, alertness, responsiveness and similar qualities. These are all indicators of mental effort. Some jobs can make heavy emotional demands on the jobholder and these should be taken into account also.
- 4.2 References to normal mental effort do not refer to what might be the norm for the job under consideration, but may be defined for example as the level of attention and awareness that might have to be applied by a person shopping in a busy supermarket.
- 4.3 Mental effort should not be confused with skill. Some highly skilled jobs may require a high degree of mental effort, but some low skilled jobs may also require a high degree of mental effort, for example, somebody required to stand by a conveyor belt checking saucepans for any faults during manufacturing will require a relatively low level of *skill* to perform this job, yet the mental effort in terms of visual concentration, attention and general alertness will be much more demanding.
- 4.4 The level of effort required is measured by the intensity, frequency and duration demanded by the job.

Intensity – ie whether general awareness, concentrated alertness or total vigilance are needed. The combinations of effort, eg visual and aural, should be taken into account.

Frequency – ie how often needed, several times daily, almost continuous, only occasional, etc.

Duration – ie whether concentration is needed for short, long or continuous periods.

When evaluating this factor, the extent to which intensity, frequency and duration of mental effort generates stress is a consideration.

- 4.45 Concentration, alertness, attention, etc may apply equally to jobs primarily concerned with handling or dealing with people as to jobs concerned with the operation of equipment and plant or the handling of cash or materials. Whether such jobs would score the same would depend on the degree and length of concentration required.

5. **PHYSICAL EFFORT**

- 5.1 This factor measures the extent of 'bodily' effort involved in carrying out the job. The title 'physical effort' rather than 'manual effort' has been used to emphasise that all aspects of bodily effort must be considered, not just that relating to work with the hands.
- 5.2 References to normal physical effort do not refer to what might be the norm for the job under consideration, but to a level of activity which would not be expected to lead to undue fatigue.
- 5.3 Equally, it is emphasised that physical effort does not just mean strength. Physical effort covers the movement of all limbs (eg legs, arms, back, etc) involved in standing, walking, stretching and other efforts such as pushing, rolling and pressing as well as lifting and lowering weights (either people or things).
- 5.4 This factor has three dimensions:-

First, the kind of factor required, ie normal, substantial or intensive;
Second, the duration of effort (sometimes referred to as stamina);
Third, the frequency of effort.
- 5.5 The degree of effort and the continuity (ie frequency and duration of effort) should be considered altogether. Though standing all the time may not appear to involve great physical activity it can require stamina if this is the working posture required over a long period of time.
- 5.6 The scheme refers to various levels of effort in awkward postures. Awkward postures includes for example doing jobs in a stretched position, eg using a screw driver or hanging curtains stretching above one's head. Similarly bending over to lift weights (either people or things). This scheme assumes that working in awkward postures increases the degree of effort required. (This may also increase the degree of manual dexterity involved but that should be considered under skill.)

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- 5.7 Because of the wide range of physical effort covered by the factor, words such as 'substantial' or 'intense' have not been defined. All aspects of physical effort including degree and continuity which are described in the job description should be considered.

6. **WORKING CONDITIONS**

- 6.1 The range of conditions which should be considered includes for example:

- heat
- cold
- rain and snow
- humidity
- noise
- smells
- dirt
- dust
- oil
- mud
- confined spaces
- darkness
- wearing/uncomfortable clothing/masks/etc
- exposure to anti-social behaviour

- 6.2 Some of these conditions may vary considerably but be equally unpleasant. For example, varying levels of high pitch noise can be as unpleasant as sudden bursts of very loud noise.

- 6.3 The additional effect of variations or combinations of conditions should be taken into account. For example, moving from cold to heat, or combining darkness and confined spaces.

- 6.4 The major consideration in this factor is the degree of unpleasantness or discomfort caused. This in turn is affected by the frequency, intensity and duration of the exposure of the job to particular conditions.

- 6.5 It is important to recognise that some jobs which may superficially appear to enjoy pleasant conditions may turn out, on closer examination, to require the job holder to endure some discomfort.

- 6.6 For example it cannot necessarily be assumed that an 'inside job' will not involve exposure to heat or cold. Nor will noise necessarily be solely associated with the operation of plant or machinery; people can make a lot of noise. Similarly dirt and smells are not necessarily solely a result of the physical environment of the job but may result from contact or work with people. It is therefore vital to keep an open mind in examining the exact nature of the job description.

- 6.7 The extent to which work can be organised by the jobholder to lessen the exposure to unpleasant conditions, and the level of control exerted by the

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jobholder over the working conditions, should also be taken into account.

- 6.8 It is emphasised that this factor does not include 'hazards'. It is, of course, recognised that some jobs appear inherently more hazardous than others. However, this scheme does not accept that this is inevitable. No job should involve an undue degree of risk, provided the proper precautions and safeguards are taken. Naturally, these may involve jobs in, for example, special training, and/or extra alertness. However, these elements will have been included under 'skill' or 'mental effort'.
- 6.9 This scheme assumes that appropriate protective clothing is provided, eg gloves will be provided when working with chemicals, masks will be provided where obnoxious smells exist, and ear protectors provided in noisy conditions. However, to the extent that protective clothing may be uncomfortable this may also create disagreeable working conditions. To the extent that protective clothing may be cumbersome, and result in increased physical effort this should be considered under 'physical effort'.