



supporting
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Grading Guidelines

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1. Background

1. EVH and Unite union operate a collective bargaining machinery which regulates salaries and terms of staff employed in around 100 Housing Associations, Housing Co-Operatives and other not for profit organisations throughout Scotland. These arrangements have their roots back in the late 1970's when a handful of organisations combined to offer common terms of employment to staff (mainly in the Glasgow area). The current terms of employment are contemporary and are often used as benchmarks by other organisations outwith the immediate sector.
2. Prior to the introduction of Grading Guidelines in 2005, salary levels were determined by reference to a common pay spine which runs over Points 1 – 51 and sets out a range of Grades that may be applied. Posts are “graded” by reference to a complimentary set of Grading Guidelines. These Guidelines have been in existence for some time now and operated effectively throughout the 1980's. They were last looked at in 1991 but revisions were minor in nature rather than wholesale. Many stakeholders now perceive the guidelines as significantly out of date when set against the complexities and business demands currently facing member organisations and staff.
3. Thus, in September 2001, EVH and the TGWU (now UNITE) issued an Invitation to Tender document seeking proposals from consultants and others to review and modernise the Grading Guidelines. There were five main aims in mind:
 - a. To take account of the diversity of organisations within the mechanism in shaping a set of guidelines which take a more generic, less functionally rigid approach to the description and classification of posts.
 - b. Consider whether a wider distribution of posts could be built into the salary range currently occupied by Grades 1 – 5 in an attempt to offer more realistic prospects for staff development and advancement.
 - c. How best to organise a reasonable methodology of rewarding senior officers in the light of unanticipated growth and complexity of organisations, and the fashion for several former functions to be led by one manager.
 - d. Whether and, if so, how best the currently excluded groups of workers might be brought into the common arrangements.

- e. How the design of a new set of guidelines will ease seamless incorporation of new and unanticipated posts in the future.
4. After examination of bids received the JNC engaged a Consulting firm which drew up and issued a revised set of guidelines in January 2003. This had not been able to achieve all of the objectives set down although many of the proposals were felt sensible by the group of JNC and other organisations which considered them. This version was issued for wider consultation throughout the Spring of 2003. The response rate was low and such replies as were received did not offer communality of support – nor consistent criticism of the draft. Indeed, the spread of comments served only to bring home how difficult it now is to establish a system which aims to offer a “one size fits all” over differing geographies, economic situations and organisational dispositions.
5. In subsequent discussions between EVH and the TGWU it was not felt that the initial version offered sufficient scope for further work. It was acknowledged that the difficulties of “pleasing” over 120 independent employers and their staff was a daunting task. Nevertheless, EVH agreed that it would have a further brief attempt at this task and would approach this with a view to setting out a simple set of guidelines with sufficient flexibility to allow some measure of local determination. EVH also agreed to structure this draft to include all 5 of the original objectives.
6. Thus, EVH offered an initial draft of this version for discussion amongst employers and staff alike in November 2003. A series of meetings was held countywide to encourage consultation through November 2003 – February 2004. Around 700 people attended these meetings, and this encouraged a high level of generally positive feedback. EVH published the results of this consultation exercise in April 2004. Throughout May – October 2004 EVH considered all that had been said and developed its final version in response. It also held a series of meetings with the Trade Union throughout 2004 and 2005.
7. Originally, there was protection incorporated into the mass movement onto the new grading and salary system: staff salary was protected indefinitely for individuals in posts and employers were protected from sudden staff cost increases too. These rules no longer apply and instead employers will set a protection period of 3 years.

2. Principles

1. In examining the spread of staff and grades employed within member organisations it is felt useful to firstly establish three main groupings:
 - a. Professional and Administrative Grades
 - b. Senior Management Grades
 - c. Technical and Support Grades
2. With these groupings in mind it is also felt that the single communal current pay spine is confusing when trying to cover all grades, thus a distinct pay spine/set of rates has been developed for each one of the above 3 sets.
3. Within each of the three spines, individual grades occupy their own unique position, it being regarded as unhelpful to perpetuate the confusing cross over of grades and salary points which currently exist.
4. Diversity of approach and levels of performance and responsibility within Senior Management posts is reflected in the arrangements set out in the appropriate section. Organisations are increasingly moving away from rigid, functionally based management arrangements and many now operate a “directoriate” or other client focused approach to managing their affairs. Group Structures, and other complex management arrangements, are also more common than before and thus the senior management section of these Guidelines has been designed to offer the flexibility required to assess such posts relative to the particular local arrangements that are in place.

3. Professional and Administrative Grades

1. This covers the great majority of staff employed – Salaries for Grades 1 to 8 will fall to be paid from the appropriate salary scale over points PA1 to 31 as set out below (an up to date salary schedule is available from EVH).
2. The titles in the table are generic – member organisations will be free to give such names to positions as best reflect the nature of the particular local role. Indeed grades attached to job titles may vary between the organisations as it is the job content rather than title that determines its grade.

NEW GRADE	SPINAL POINTS
1 – Trainee	1 or 2
2 – Clerical Assistant	3 – 4
3 – Clerical Officer	5 – 8
4 – Administrative Assistant	9 – 12
5 – Senior Administrative Assistant	13 – 16
6 – Assistant Officer	17 – 20
7 – Professional Officer	22 – 25
8 – Senior Professional Officer	28 - 31

3. Development schemes will feature at all levels. There will be a specific “Officer” training scheme – Appendix 1 and a more general set of development arrangements applicable to all other grades – Appendix 2.
4. Trainee Grade 1 – this level is intended to provide entry opportunities, for the main part, to young unqualified school leavers. Organisations must only engage a Trainee with a view to successfully preparing the new worker to quickly attain a Grade 2 post within no longer than 12 months training. Organisations are free to move the Trainee onto Grade 2 at any time prior to the 12-month period. Organisations are free to engage a Trainee on either of spinal points 1 or 2 though it is

hoped that in most cases point 2 would be the preferred starting point.

5. Officer Training Scheme and General Development Scheme – details of these opportunities are given at Appendices 1 and 2. Staff and organisations should be aware that participation in such schemes is voluntary. Successful completion of Officer Training will result in the staff member being offered immediate movement to an Officer level post. Successful completion of the more general development scheme does not guarantee movement to a new grade. Such training and development initiatives must not be used as a substitute for normal “acting up” arrangements performed in periods of staff absence.

Definitions

The following table gives example definitions for all of the above new grades above. These deliberately avoid functional titles, concentrating instead on the typical job content that would be expected in posts – irrespective of function(s).

Full Model Descriptions for all Grades 1 – 8 are given at Appendix 3.

Grade And Spinal Points	Generic Title	Typical Characteristics
Grade1 (Points PA1 – PA2)	Trainee	<p>This represents the entry-level point for school leavers and others of having no previous significant experience of the type of work. The purpose of such posts is to sufficiently prepare the post-holder to successfully attain a Clerical Assistant post (Grade 2) after no more that 12 months training. This grade is principally aimed at the younger school leavers holding few, if any formal qualifications.</p> <p>Trainees would be offered exposure to a wide range of fairly simple duties covering experience in one or more functions.</p>
Grade 2 (Points PA3 – PA4)	Clerical Assistant	<p>This represents the first substantive level post within the organisation and is suitable for applicants with some measure of previous experience within a relevant setting.</p> <p>Characteristically such posts will include routine office skills and activities.</p> <p>Post-holders will be expected to receive ongoing direction on most non-routine aspects of the role. There will be little discretion to organise the administration of the workload within such posts.</p>

<p>Grade 3 (Points PA5 – PA8)</p>	<p>Clerical Officer</p>	<p>Such posts will include responsibility for well-defined areas of administration within policy and /or procedural guidelines.</p> <p>The bulk of work will primarily be concerned with servicing more senior staff and the collation and provision of routine information for use of seniors/the organisation.</p> <p>Any contact with tenants/clients will be mainly of an information exchange nature. Postholders will operate within well-understood clerical/administrative procedures and will have only limited discretion to vary the operation of these.</p> <p>There will be no responsibility for the supervision of other staff – save for assisting with the routine induction of new staff and the provision of ongoing assistance to Trainees.</p>
<p>Grade 4 (Points PA9 – PA12)</p>	<p>Administrative Assistant</p>	<p>Grade 4 posts will require a noticeable level of experience and competence in the administration of the function(s) concerned.</p> <p>Such posts will include moderate levels of judgement in terms of the execution and administration of existing procedures. Discussion with customers/clients and others will feature in terms of processing routine business towards conclusion.</p> <p>Posts at Grade 4 may include some degree of supervision of less senior staff within.</p> <p>Post-holders will be expected to know the great majority of routine procedures within their own area of work and be able to answer queries on these from colleagues and others.</p>

<p>Grade 5 (Points PA13 – PA16)</p>	<p>Senior Administrative Assistant</p>	<p>At this level post-holders will be expected to successfully conclude business issues involving a wide range of people and situations.</p> <p>Post-holders will be expected to “run” a given block of work on behalf of the organisation or a nominated “boss”. Such posts will require acute awareness of the how the work involved interacts with other activities within the organisation.</p> <p>Grade 5 staff will be familiar with the ongoing need for updating office/functional procedures in line with management/organisational developments.</p> <p>Ingathering, storage, retrieval, interrogation and presentation of more complex data will feature frequently, and there will be some expectations that post-holders at this level will analyse such information and offer conclusions as to its impact.</p> <p>Staff at Grade 5 will not receive detailed supervision on the bulk of their core tasks. Grade 5 staff will often be responsible for supervision of others and co-ordinating work deadlines and priorities of other less senior staff.</p> <p>Post-holders will typically be expected to have a wide range of external contacts in relation to the work they perform. Grade 5 staff will be expected to suggest solutions to administrative difficulties and to contribute to proposed procedural changes.</p> <p>Judgement will feature routinely in Grade 5 positions in determining which matters need to be referred to seniors and which do not.</p>
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<p>Grade 6 (Points PA17 – PA20)</p>	<p>Assistant Officer</p>	<p>Semi-specialist posts for which previous training/experience will be needed over and above a general level of exposure to clerical and administrative work.</p> <p>Staff will be expected to draw conclusions from data drawn from many sources, suggest action and follow up detailed queries. Such skills will be applied in a range of situations where functional experience and judgement have to be used in order to make operational decisions without the need to consult seniors.</p> <p>Staff at this level will be expected to know how and where to obtain further information from a wide range of contacts in order to successfully resolve important operational queries.</p> <p>Technical know how and the ability to make sense of incomplete data will be a common feature, as will be the need to maintain complex records upon which suggestions and operational assumptions may be based.</p> <p>At Grade 6, staff will give advice and information that commits the function/organisation to (non-critical) actions.</p> <p>Supervision of others may often be expected.</p> <p>Involvement in recruitment and ongoing development of less senior staff and staff in other disciplines will also arise.</p> <p>Grade 6 may also be used by organisations for in-house “Officer Training” posts.</p>
<p>Grade 7 (PA22 – PA25)</p>	<p>Professional Officer</p>	<p>This is the core professional officer grade.</p> <p>Post-holders at this level will report to Senior Professional Officers/Managers for a significant aspect of the function(s) concerned. A high degree of technical/professional knowledge will</p>

	<p>therefore be a pre-requisite (by way of a relevant tertiary qualification or other validated work experience and/or training).</p> <p>Professional Officers will advise and support new and other staff within the function on specialist information and may also manage less senior staff. The bulk of work will be taken forward to conclusion on the post-holder's own initiative within policy guidelines and postholders will be accountable for such work.</p> <p>Most work will be self-generated and prioritised by the post-holder and typical completed work will bind the function or organisation to a course of action. Professional Officers will have a wide range of external contacts at professional level within the relevant specialist area.</p> <p>They will be expected to negotiate frequently with service users and providers and liaise with a number of external bodies at a professional level.</p> <p>Posts which provide specialist internal support corporately within the organisation will also qualify for consideration at this grade.</p> <p>Staff at this level will be responsible for the successful delivery and achievement of operational and performance standards.</p> <p>Post-holders will be expected to contribute to policy development within the relevant functional area(s).</p> <p>Awareness of "best practice" and the ability to structure systems to achieve this throughout the function(s) will also be routinely required.</p>
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<p>Grade 8 (PA28 – PA31)</p>	<p>Senior Professional Officer</p>	<p>Staff at this level may be second in line officers in small organisations. In large settings Grade 8 staff may manage functional area(s) where one or more Grade 7 staff are in place</p> <p>Grade 8 staff are expected to routinely offer important and specific contributions to policy formulation through senior management and committees/boards as it relates to the postholder’s sphere(s) of influence. Responsibility for forward planning of services, including standards and resources, will also feature as a matter of routine.</p> <p>External contacts will predominantly be with senior professionals and decision makers.</p> <p>Achievement of budgetary and other corporate targets will be expected as will achievement of regulatory and other external validatory processes and legal requirements.</p> <p>In settings where operational activity is delivered through a series of local offices, a specialist professional role may be combined with more general operational responsibility for the local office at this level.</p> <p>In recognition of the significant skills and responsibilities that may feature in some Grade 8 posts there is the opportunity to consider placing the salary spread on the lower regions of the Senior Manager scale – Grade 9. EVH must be asked to perform an assessment in every such case.</p>
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4. Senior Management Grades

1. Diversity of approach and levels of performance expected and responsibility now held within Senior Management posts is reflected in the following arrangements. Organisations have increasingly struggled of late to understand and set, fair reward arrangements for senior staff in increasingly diverse and demanding management structures. Many employers in the sector now operate a “Chief Executive/Directorate” structure or other client and service focused approach to managing their affairs and delivering services. Group Structures, and other complex management arrangements, are also more frequently seen than before and thus this section of the Guidelines has had to take into account the fact that few management level posts across the country will be absolutely the same. Thus the arrangements for senior management staff have been designed with flexibility in mind. Whilst organisations are encouraged to assess such posts relative to the particular local arrangements that are in place, these Guidelines do nevertheless set out some parameters that should be taken into account.
2. This section covers all Principal Officers and the bulk of Second-in Line Managers in organisations of up to 4,000 units in management. In the very small organisations, some Second-in-Line Officers may be more appropriately placed on Senior Professional Officer Grade. It is not possible to be overly prescriptive and thus the range of salary points available over SM1 – SM31 offers a degree of flexibility for local organisations.
3. Principal Officers will be paid at Grade 10 and there will be only one such post in any given organisation. Principal Officers will be paid over any three consecutive points within the range of points SM1 – SM31.
4. Second-in-Line Managers will be paid at Grade 9 and organisations will be free to determine the number and scope of any such posts. Such posts will be paid over any three consecutive points within the range of SM1 – SM19.
5. In determining the three point range for any given post, organisations should take account of the “bar” points (size based) indicated – these represent the upper level available and organisations will be free to set upper salaries below such bars, taking account of the vital aspects that reveal the importance of the role – such as:
 - Staff
 - Budget
 - Technical Know-how
 - Level of accountability

- Risk
 - Development/External activities
 - Depute role
 - Tenure mix
 - Geography and location
 - Management/Committee/Board structure
 - Special local factors
- The above list is not exhaustive.
6. EVH is happy to assist organisations in establishing a fair range for any given Senior Management post within an organisation. A factor based Assessment Grid for determining placement on the appropriate scale is attached at Appendix 4. It will be rare for posts to attain the “top 3” salary points within the given size band.
 7. An organisation does not require to pay all Second-in-Line posts similarly. If job content and complexity is assessed on a post-by-post basis (as above) it is accepted that some senior posts may attract a higher rate than others.
 8. Organisations whose size and complexity is not principally measured in relation to the number of units in management should contact EVH for assistance in comparing their situation to the size bars set out. For organisations which do measure size in direct relation to houses/stock – these arrangements are based on any non-owned stock counting as $\frac{1}{2}$.
 9. Spinal point ranges for posts at Grades 9 and 10 are as follows shown below (salaries as per attached Schedule).

Grade 9

Point	Bar Points
1	
2	
3	
4	
5	
6	
7	500 units or less
8	
9	
10	
11	1,000 units or less
12	
13	
14	2,000 units or less
15	
16	
17	3,000 units or less
18	
19	

Grade 10

Point	Bar Points
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	500 units or less
13	
14	
15	
16	
17	
18	
19	1,000 units or less
20	
21	
22	
23	
24	
25	2,000 units or less
26	
27	
28	3,000 units or less
29	
30	
31	

5. Technical and Support Staff

1. This section sets salaries/pay rates for staff involved in care and support, trades, technical, security, environmental and all other “non-office” type posts.
2. It is appreciated that many organisations and staff operate rates of pay in such disciplines that are historically based and are based on rates set by external organisations in the past. The set of scales given below aims to provide sufficient flexibility for organisations to move such all staff onto agreed EVH rates.
3. Whilst a range of suggested titles appear*, it is accepted that organisations will again wish to use post names reflective of local circumstances. It is further accepted that what constitutes the role of e.g. a “Warden” will vary markedly from area to area. Thus organisations have flexibility to select sensibly within the 6 grades on offer.
4. Technical and Support Staff posts will operate over 6 unique grades – each with a two point incremental scale as shown (salaries as per attached Schedule).

Grade	Example Posts*
TAS1	Office Cleaner Porter
TAS2	Driver, Caretaker, Cleaner – care setting, Catering Assistant
TAS3	Warden, Gardener, Qualified Cook, Concierge
TAS4	Senior Concierge, Senior Warden, Gardening Supervisor, Senior Cook, Handyperson, Trades Labourer
TAS5	Small Repairs Officer
TAS6	Fully qualified tradesmen and women

Definitions

The following table gives example definitions for all of the TAS grades above. These deliberately avoid functional titles, concentrating instead on the typical job content that would be expected in posts – irrespective of function(s).

Full Model Descriptions for all Grades 1 – 6 are given at Appendix 5.

GRADE	EXAMPLE POSTS	TYPICAL CHARACTERISTICS
TAS1	Office Cleaner Porter	<p>This represents the first level of this grade. There is no expectation for formal qualifications or significant experience for this type of work. The duties would be straightforward with on the job training given where necessary and expectations set by the line manager.</p> <p>There are no specific skills and knowledge required at this level but some previous experience may be helpful. The post holder should have the ability to follow job and safety instructions, be reliable and able to work alone without supervision or as part of a team.</p>
TAS2	Driver, Caretaker, Cleaner – care setting, Catering Assistant	<p>It would be desirable for the post holder to have previous experience of similar or related work.</p> <p>Where applicable a relevant first level qualification/ certification maybe required which demonstrates skill/knowledge relevant to the role (e.g. SVQ Level ½ Cleaning & Support Services, full driving licence, food hygiene certificate).</p> <p>Basic literacy and numeracy skills will be required to undertake these roles.</p> <p>Most workload will be organised by the line manager with limited input from the post holder.</p>

<p>TAS3</p>	<p>Warden, Gardener, Qualified Cook, Concierge</p>	<p>The post holder would be expected to have previous experience of similar or related work.</p> <p>Educational qualifications at secondary level will be desirable along with any applicable certification related to the job role.</p> <p>The post holder will have responsibility for defined areas of work with the ability to work with minimal supervision. A level of discretion over workload will be given but the post holder will not have full autonomy.</p> <p>It is expected that moderate levels of judgement will be required day to day but knowing when to escalate more difficult situations upwards will be required.</p> <p>Post holders will be expected to understand the routine procedures associated with the role.</p>
<p>TAS4</p>	<p>Senior Concierge, Senior Warden, Gardening Supervisor, Senior Cook, Handyperson, Trades Labourer</p>	<p>The post holder will have a noticeable level of experience and competence in relation to their role.</p> <p>Educational qualifications at secondary level will be desirable along with any applicable certification related to the job role.</p> <p>The post holder will have accountability for defined areas of work and be expected to work with minimal supervision.</p> <p>A significant level of judgement is expected so the post holder can assist other colleagues with tasks and provide answers to queries.</p> <p>Post holders will be expected to understand the routine procedures associated with the role and also the more complex procedures.</p> <p>Post holders may be involved in training more junior colleagues as well as allocation of agreed tasks throughout the day. This level may act as</p>

		a point of escalation for less senior roles but no line management responsibility is expected.
TAS5	Small Repairs Officer	<p>The post holder will have a degree of knowledge on a wide variety of repair disciplines associated with small works (e.g. joinery repairs, plumbing repairs, basic electrical works). It may also be accepted that the post holder has more experience in one area with the ability to carry out other small repairs.</p> <p>The ability to work under pressure and to deadlines is essential therefore good judgement and organisational skills are expected by the post holder.</p> <p>They will have the ability to assess the need for work to be carried out by a fully qualified tradesperson if deemed necessary.</p> <p>The post holder will have a significant level of responsibility over own workload and will have to prioritise jobs.</p> <p>Post holders may be responsible for training more junior colleagues as well as their day to day supervision but no responsibilities for disciplinary matters or performance appraisal.</p> <p>Day to day supervision can include the allocation of tasks, mentoring and checking of work.</p> <p>A high level verbal communication skills in order to communicate with customers regarding jobs will be essential.</p>
TAS6	Fully qualified tradesmen and women	The post holders expected to have a high level of skill, knowledge and experience within their specified trade (e.g. knowledge and understanding of health and safety legislation related to all aspects of property repair works and understanding of building regulations related to the post holders relevant trade.

		<p>A high degree of technical knowledge will be a pre-requisite along with a recognised formal apprenticeship and SVQ Level 2 or equivalent qualification relevant to the specific trade.</p> <p>There will be an expectation for the post holder to undertake ongoing training and development to maintain and develop their level of skill and knowledge within their trade.</p> <p>The post holder will have the knowledge and understanding regarding industry standards.</p> <p>The post holder will have responsibility for managing their own workload and will use their technical knowledge to apply judgement when carrying out repairs. Work will be carried out to high productivity levels while maintaining quality and safety standards.</p> <p>It will be required to work as part of a team to provide a quality first time fix and to be able to communicate effectively to customers in a polite and professional manner to ensure that they receive a high level of service.</p> <p>A high level of literacy and numeracy skills are required for the completion of paperwork. Further to this the post holder could be expected to produce routine reports on repairs.</p> <p>Supervision and line management of others maybe expected as part of this role e.g. apprentices and labourers of the same trade.</p>
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Appendix 1

Officer Training Scheme

The purpose of this scheme is to assist organisations meet future skills gaps at this critical level, and also to offer staff and new entrants the opportunity to formally train to occupy important positions within the sector. The JNC recognises the difficult balance organisations face in squaring popular “grow your own” initiatives with the demands that all opportunities are offered openly to all. Organisations wishing to offer this scheme must therefore design it in line with the following minimum requirements.

Eligibility

Entry to Officer Training Schemes will not be restricted to in-house staff nor to external applicants only. Where an “officer” gap is identified the organisation will publicise the opportunity as fully as it would do with a standard vacant post.

Scheme length

The scheme will last for two years and successful completion will result in the staff member immediately moving into an Officer grade post (Spinal Points PA22 – PA25).

Salary

Officer Trainees will receive spinal point PA19 in year 1 and PA20 in year 2 – or the salary currently earned if higher for internal candidates.

Training Plan

All schemes must set out detailed arrangements for each of the following:

- Competencies that are to be developed
- Educational qualifications to be achieved/progressed through the training scheme period
- Specialist skills that will be acquired during the training period
- The identified mentor for the trainee
- Support and supervision plan in place and approved by the organisation’s principal officer
- Evaluation process clearly set out
- Prior validation of proposed scheme from the JNC to help ensure consistency of approach and to allow the sector to share best practice

Certification

All trainees who successfully complete the two-year training to the satisfaction of the organisation concerned will be provided with a confirmatory certificate. This will record the satisfactory completion of Officer Training and will identify the function(s) which the particular scheme covered.

Cases of difficulty

Trainees who leave prior to the expected scheme end will receive a letter indicating the stage that had been reached. In such cases where trainees fail to complete the course or ask to revert to their former post, this will be possible and the staff member concerned will suffer no detriment (including incremental progression that would have otherwise been achieved) to their base salary.

Progression

In all cases organisations will train with specific posts in mind.

*** Organisations are free to offer more generic training to all staff to assist them to confidently apply for posts of a higher grade through time, but this is a different arrangement and is described separately.

Appendix 2

General Development Scheme

The purpose of this simple scheme is to assist organisations meet future skills gaps at various levels, both within the given organisation and more generally throughout the sector.

Organisations and staff are free to agree formal development initiatives, which help the staff member concerned, garner the range of skills and competencies likely to feature in typical posts one grade above the current level. There will be no compunction on organisations to offer such schemes, nor can individual staff members be compelled to participate.

Neither will there be any guarantee of a post at the higher level once training has been completed.

Eligibility

There are formal Training Schemes in place at Grade 1 Trainee and Grade 6 – Officer Trainee levels. This more general scheme is therefore directed principally towards existing staff in Grades 2 – 6 and in those occupying Grade 7 posts.

Scheme length

There is no standard “scheme length”. The timeframe will be set in each specific case following discussions between manager and staff member.

Salary

Staff will remain within the current Grade whilst engaged on this scheme.

Training Plan

All schemes must set out arrangements for each of the following:

- Competencies to be aimed for
- Educational qualifications to be advanced through the training scheme period □
Specialist skills that will be acquired during the training period
- Support and supervision plan in place and approved by the organisation’s principal officer
- Evaluation process clearly set out

- Prior validation of proposed scheme from the JNC to help ensure consistency of approach and to allow the sector to share best practice

Certification

Staff satisfactorily completed such a scheme will be provided with a certificate from the organisation confirming the details of the training and the particular skills and functions covered during the training period.

Cases of difficulty

In cases where schemes have to be cut short the staff member involved will suffer no detriment and will revert to their substantive post.

Progression

Organisations throughout the sector are encouraged to recognise the value of training certificates presented by candidates applying for vacant posts.

Organisations are also encouraged to be imaginative and offer this type of formal development opportunity to all disciplines.

Appendix 3
Model Descriptions for PAG Grades 1 - 8

Model Description for – Grade 1
 Spinal Points PA1 or PA2

<p>Expected Characteristics</p> <ul style="list-style-type: none"> • Entry-level post. • Series of routine, supervised exposure to simple tasks. • Identified supervision and training plan arrangements in place suitable to ensure movement to Grade 2 post within no more than 1 year. 	
<p>Local Job Description (function/tasks in line with the above)</p>	<p>Expected level of technical/professional knowledge</p> <p>N/A</p>
<p>Local Post Title</p>	<p>Trainee</p>

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Model Description for - Grade 2
Spinal Points PA3 – PA4

Expected Characteristics <ul style="list-style-type: none">• First substantive level post within the organisation.• Routine office/functional activities.• On-going supervision on most aspects of the role.• Little discretion to organise the administration of the workload.	
Local Job Description (function/tasks in line with the above)	Expected level of technical/professional knowledge <p>Some measure of previous exposure to such work desirable but not essential.</p>
Local Post Title	

Model Description for - Grade 3

Spinal Points PA5 – PA8

<p>Expected Characteristics</p> <ul style="list-style-type: none"> • The post will include some responsibility for well-defined areas of administration within policy/procedural guidelines. • Collation and provision of routine information and operational support to others. • Contact with clients/customers may feature but will be of an information exchange nature. • Operates within well-understood procedures with little, if any, discretion to vary these. • No responsibility for supervision of others staff save for participating in new staff induction programmes and provision of on-going assistance to Trainees. 	
<p>Local Job Description (function/tasks in line with the above)</p>	<p>Expected level of technical/professional knowledge</p> <p>Some measure of previous experience desirable but not essential.</p>
<p>Local Post Title</p>	

Model Description for – Grade 4

Spinal Points PA9 – PA12

Expected Characteristics

- Noticeable level of experience and competence in the administration of the function(s) concerned.
- Moderate levels of judgement in the execution and administration of existing procedures.
- Discussions with customers/clients and others will feature in terms of processing routine business towards conclusion.
- Some degree of day-to-day supervision of less senior staff – such as allocation of work tasks/prioritising competing daily work activities.
- Sound knowledge of the majority of routine procedures within the areas covered by the post and act as a source of information on such activities to others.

**Local Job Description
(function/tasks in line with the above)**

**Expected level of
technical/professional
knowledge**

Previous experience of similar or related work will be essential.

Educational qualifications at secondary level desirable where not otherwise matched by experience.

Local Post Title

Model Description for – Grade 5

Spinal Points PA13 – PA16

<p>Expected Characteristics</p> <ul style="list-style-type: none"> • With support and guidance, conclude business issues involving a range of people and situations. • A given block of work activity will fall to post holder from the organisation or a nominated manager. • Acute awareness of the purpose and importance of the work involved and its effect on other operational aspects of the organisation. • Familiarity with routine updating of office/functional procedures in line with corporate guidance provided. • Responsibility for gathering and presentation of operational data and ability to offer conclusions on this. • Little supervision on the bulk of core tasks. • Some responsibility for co-ordinating work deadlines and priorities of less senior staff. • Wide range of external contacts will often feature in relation to the specific work performed. • Suggest solutions to administrative difficulties encountered in the block of work involved. □ Elements of judgement will feature, but in relation only to the identified role. 	
<p>Local Job Description Expected level of (function/tasks in line with the above) technical/professional</p>	<p>knowledge</p> <p>Previous relevant experience will be essential.</p> <p>Educational qualifications at secondary level or equivalent will be essential (solid work experience operating in posts at or around this level can compensate for the lack of formal qualifications).</p>
<p>Local Post Title</p>	

Model Description for - Grade 6

Spinal Points PA17 – PA20 (may also be used for Officer Training posts)

<p>Expected Characteristics</p> <ul style="list-style-type: none"> • Semi-specialist post assisting “officers” and others in concluding business on behalf of the function(s)/organisation. • Draw conclusions from data drawn from many sources, suggest action for others to follow, and assist in following up detailed queries that may arise. • Work activity will be performed in a range of situations where functional experience and judgement will be required in order to make routine operational decisions within the boundaries of existing policies. • Wide range of contacts will typically feature and be used to successfully take forward allocated work. • Technical/operational know how will be a common feature, as will the need to maintain complex records upon which operational assumptions may be based. • Provide advice and information that commits the function to (non-critical) actions. • Supervision of others on day-to day work may be expected as will involvement in recruitment and ongoing development of less senior staff. 	
<p>Local Job Description (function/tasks in line with the above)</p>	<p>Expected level of technical/professional knowledge</p> <p>As a semi-specialist post, previous work experience and training will be required over and above any general previous exposure to clerical/administrative work.</p> <p>Educational qualifications at secondary level desirable where not otherwise matched by experience.</p> <p>Progress towards qualifications beyond secondary level will be desirable.</p>
<p>Local Post Title</p>	

Model Description for Grade 7
 Spinal Points PA22 – PA25

<p>Typical Expected Characteristics</p> <ul style="list-style-type: none"> • Core professional grade reporting to seniors for a significant aspect of the function(s) concerned. • Provide advice and support to other staff within the function on specialist information. • May require to manage less senior staff. • Take bulk of work forward to conclusion on own initiative within set policy guidelines and be accountable for such work. • Most work will be self-generated and in many cases work concluded will bind the function/organisation to a course of action/provision of service. • Exceptionally wide range of external contacts, many of which will be at professional level or above within the relevant specialist area(s). • Negotiate with service users and providers and liase with a range of external bodies at a professional level. • Hold responsibility for successful delivery and achievement of operational performance and standards in the allocated part of the function(s) concerned. • Contribute to relevant policy development and procedures that support such changes. □ Awareness of “best practice” demands and able to structure operational activity to strive towards meeting such demands. 	
<p>Local Job Description (function/tasks in line with the above)</p>	<p>Expected level of technical/professional knowledge</p> <p>A high degree of technical/professional knowledge will be required.</p> <p>Possession of, or progress towards, relevant tertiary qualifications will be essential in all but exceptional cases where the skill sets required can be shown to have been achieved by other work related means.</p>
<p>Local Post Title</p>	

Model Description for Grade 8
 Spinal Points PA28 – PA31

Expected Characteristics

- May perform a second in line role in small organisations*, or lead functional or geographical area(s) in larger concerns.
- Will normally manage 1 or more staff at Grade 7, except in highly specialist/single officer functions.
- Routinely offer important and specific contributions to policy formulation through senior management and committee/board structures as it relates to the post-holder's sphere(s) of influence.
- Heavily involved in the forward planning of existing services, including standards and resources.
- External contacts will predominantly include senior professional and others with decision making powers.
- Achievement of budgetary or other corporate standards will be expected, as will achievement of regulatory and other external validation processes and legal requirements.
- In diverse geographical situations a specialist professional role may be combined with more general operational responsibility for the local office at this level*.
- May occupy a specialist corporate or generalist role within the organisation*.

* In all such cases organisations will be free to consider placing the salary spread on the lower regions of the Grade 9 salary scale (no higher than point SM4). EVH must be asked to perform an assessment in every such case.

Local Job Description
 (function/tasks in line with the above)

Expected level of technical/professional knowledge

A high degree of technical/professional knowledge will be required, coupled in many instances with some management experience/skills.

Possession of relevant tertiary qualifications will be essential in all but exceptional cases where the skill sets required can be shown to have been achieved by other work related means.

Local Post Title

Appendix 4 Senior Management Grades (9 & 10)

Factor based assessment grid for determining placement within the defined “size band.”

It is suggested that Management Committees/Boards seek assistance from EVH in performing/validating this assessment.

FACTOR	ASSESSMENT OF DEMAND		
	HIGH	MEDIUM	LOW
Staff management responsibilities			
Budgetary responsibilities (size, complexity, range of funding sources)			
Technical know how involved			
Extent of accountability held			
Degree of business risk			
Complexity/range of development and external activities			
Depute role involvement			
Tenure/business mix			
Geographical/location issues			
Complexity of Management/Committee/Board structures			
Special local factors (no more than 3)			
<input type="checkbox"/>			
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	HIGH	MEDIUM	LOW
OVERALL ASSESSMENT			

Appendix 5 TAS Grades (1-6)

Model Description for TAS1

<p>Expected Characteristics</p> <ul style="list-style-type: none"> • This represents the first level of this grade. • The duties would be straightforward with on the job training given where necessary and expectations set by the line manager. • The post holder should have the ability to follow job and safety instructions, be reliable and able to work alone without supervision or as part of a team. 	
<p>Local Job Description (function/tasks in line with the above)</p>	<p>Expected level of technical/professional knowledge</p> <p>There is no expectation for formal qualifications or significant experience for this type of work.</p> <p>There are no specific skills and knowledge required at this level but some previous experience may be helpful.</p>
<p>Local Post Title</p>	

Model Description for TAS2

Expected Characteristics <ul style="list-style-type: none">• Basic literacy and numeracy skills will be required to undertake these roles.• Most workload will be organised by the line manager with limited input from the post holder.	
Local Job Description (function/tasks in line with the above)	Expected level of technical/professional knowledge <p>Previous experience of similar or related work would be desirable.</p> <p>Where applicable a relevant qualification/ certification may be required to demonstrate skill/knowledge relevant to the role (e.g. SVQ Level 1/2 Cleaning & Support Services, full driving licence, food hygiene certificate).</p>
Local Post Title	

Model Description for TAS3

Expected Characteristics <ul style="list-style-type: none">• The post holder will have responsibility for defined areas of work with the ability to work with minimal supervision. A level of discretion over workload will be given but the post holder will not have full autonomy.• It is expected that moderate levels of judgement will be required day to day but knowing when to escalate more difficult situations upwards will be required.• Post holders will be expected to understand the routine procedures associated with the role.	
Local Job Description (function/tasks in line with the above)	Expected level of technical/professional knowledge <p>The post holder would be expected to have previous experience of similar or related work.</p> <p>Educational qualifications at secondary level will be desirable along with any applicable certification related to the job role.</p>
Local Post Title	

Model Description for TAS4

Expected Characteristics <ul style="list-style-type: none">• The post holder will have accountability for defined areas of work and be expected to work with minimal supervision.• A significant level of judgement is expected so the post holder can assist other colleagues with tasks and provide answers to queries.• Post holders will be expected to understand the routine procedures associated with the role and also the more complex procedures.• This level may act as a point of escalation for less senior roles. Post holders may be responsible for training more junior colleagues as well as their day to day supervision.	
Local Job Description (function/tasks in line with the above)	Expected level of technical/professional knowledge <p>The post holder will have a noticeable level of experience and competence in relation to their role.</p> <p>Educational qualifications at secondary level will be desirable along with any applicable certification related to the job role.</p>
Local Post Title	

Model Description for TAS5

Expected Characteristics <ul style="list-style-type: none">• The ability to work under pressure and to deadlines is essential therefore good judgement and organisational skills are expected by the post holder.• The ability to assess the need for work to be carried out by a fully qualified tradesperson if deemed necessary.• The post holder will have a significant level of responsibility over own workload and will have to prioritise jobs.• A high level verbal communication skills in order to communicate with customers regarding jobs.• Post holders may be responsible for training more junior colleagues as well as their day to day supervision.	
Local Job Description (function/tasks in line with the above)	Expected level of technical/professional knowledge <p>The post holder will have a degree of knowledge on a wide variety of repair disciplines associated with small works (e.g. joinery repairs, plumbing repairs, basic electrical works). It may also be accepted that the post holder has more experience in one area with the ability to carry out other small repairs.</p>
Local Post Title	

Model Description for TAS6

<p>Expected Characteristics</p> <ul style="list-style-type: none"> • A specialist posts within a specified trade (e.g. electrician, joiner, plumber). • Ongoing training and development to maintain and develop the required level of skill and knowledge for the particular trade. • The post holder will have the knowledge and understanding regarding industry standards. • Responsibility for managing own workload. • Use of technical knowledge to apply judgement when carrying out repairs. • Work will be carried out to high productivity levels while maintaining quality and safety standards. • Working as part of a team to provide a quality first time fix • Ability to communicate effectively to customers in a polite and professional manner to ensure that they receive a high level of service. • A high level of literacy and numeracy skills are required for the completion of paperwork. • There maybe an expectation to produce routine reports on repairs. • Supervision and line management of other staff members maybe expected as part of this role. 	
<p>Local Job Description (function/tasks in line with the above)</p>	<p>Expected level of technical/professional knowledge</p> <p>A high level of skill, knowledge and experience within a specified trade (e.g. knowledge and understanding of health and safety legislation related to all aspects of property repair works and understanding of building regulations related to the post holders relevant trade.</p> <p>A high degree of technical knowledge will be a pre-requisite along with a recognised formal apprenticeship and SVQ Level 2 or equivalent qualification relevant to the specific trade.</p>
<p>Local Post Title</p>	