**QUEEN’S UNIVERSITY OF BELFAST**

**SUBSTANTIAL CHANGE REVIEW PROCESS**

**Guidance Notes**

There may from time to time be a requirement to review the grading of a post where it is evident that the nature of the role has changed substantially.

If it has been identified by the line manager that a post has significantly changed, he/she should discuss the changes with the relevant HR Business Partner.

Posts will only be reviewed if there has been a substantial change in duties and responsibilities i.e. the key dimensions of the post eg: complexity, decision making, planning etc. identified and agreed by the line manager and the Head of School or Director since it was originally evaluated. A post shall not be evaluated unless the substantial change review form has been signed by the Head of School or Director.

The opportunity to submit a request for evaluation applies to individual roles. There are however a number of posts that would be deemed as generic (ie: where a number of people do essentially the same job, eg: Cleaner, Porter; Library Assistant; HR Business Partner; Estates Manager; Analyst/Programmer; School Secretary; School Manager etc). These type of posts would not normally be reassessed on an individual post holder basis.

If it has been identified that there have been changes to more than 1 post within a School/Directorate/Department, where possible, these posts should be considered for evaluation at the same time.

The substantial change form must be completed by the line manager, signed by the post holder and the Head of School/Director and submitted to the HR Business Partner. It must clearly state the specific changes to the role and the reasons for these changes and include the following:

* A revised job summary form
* The original job summary form. (If generic job summary, specific duties must also be included)
* A School/Directorate/Department organisation chart (current & previous)

**A post shall not be considered for evaluation unless this information is provided.**

Further guidance can be obtained via the [Job Evaluation](http://www.qub.ac.uk/directorates/HumanResources/job-evaluation/) web pages on the People and Culture website.

It is not normally expected that posts will be reviewed within a period of **3 years** from the date of any previous review.

**Process**

1. The post will normally be matched, in the first instance, by the Local Job Matching Panel consisting of Head of School/Director and a representative of People and Culture.
2. In instances where the grading of a post is not agreed by a Local Job Matching Panel then it shall be considered by a Central Moderation Panel.
3. The decision of the Panel will be conveyed in writing to the member of staff

Please complete Sections A and B and forward electronically, together with all of the required accompanying documents, to the HR Business Partner.

**QUEEN’S UNIVERSITY OF BELFAST**

**SUBSTANTIAL CHANGE REVIEW FORM**

**Section A**

|  |  |
| --- | --- |
| Name of Post holder |  |
| School/Directorate |  |
| Department/Division |  |
| Current Grade |  |
| Proposed Grade |  |
| Current Job Title |  |
| Proposed Job Title (if different)(Statement about change of job title) |  |
| Contract Type  | Click to select contract type |
| Date Post was Last Matched |  |

**Section B**

Describe fully, under the following headings, the substantial changes in the above post.

*(This should relate to the duties and responsibilities of the post and not the personal characteristics of the post holder i.e. the key dimensions of the job which have changed considerably such as responsibilities relating to planning and organising, decision making, responsibility for resources, acquired knowledge, increased complexity of role and changed accountability. Requests for review should not be made in instances where the driver is solely based on a change of process or technology or increase in volume.)*

**1.** Has there been a substantial structural change within the Section/Department which affects this particular role?

**Yes/No**

If yes, please give details and provide any relevant supporting documents relating to this.

**2**. Please attach the organisational chart for the department/unit (include the previous and updated organisational charts for the area). This should include details of the number of staff and their grades to be managed by the post holder.

1. Give specific details of how the responsibilities of this post have significantly increased? e.g. management of staff/resources/equipment; planning and organising; decision making/problem-solving within functional area; impact of decisions etc. Give examplescomparing previous levels of responsibility with the increased level of responsibility.

*(This should not replicate the job summary information. It should be a supporting statement for the substantial change review request).*

1. Did the substantial change/s to the job necessitate the acquisition of more knowledge/skills in a new or unfamiliar area?

**Yes/No**

If yes, please specify, how long did it take to acquire the new knowledge/skills?

1. Will the changes you have outlined above become an integral part of the post or are they as a result of a special project that has been undertaken for a fixed period?
2. Please indicate the date when the post holder undertook and carried out fully and satisfactorily the responsibilities of the new duties. (Please note that post holders are expected to carry out any new duties for at least 12 months before the post can be considered for re-grading)

**Please note, if post is regraded, the date of regrading will be date of submission of all completed final documentation.**

1. Has the structural change and/or the substantial change in this post had any impact on the duties and responsibilities of other posts within your area? If so please detail.
2. Please provide any other relevant information in support of this application.(if applicable)

**SIGNATURES** (can be typed or scanned)

|  |  |
| --- | --- |
| Post Holder: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Print Name Signature |
| (*I confirm that I agree with the content of this form and revised job summary)*. |
| Line Manager: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Print Name Signature |
| (*I confirm that I agree with the content of this form and revised job summary)*. |
| Head of School/Director: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Print Name Signature |
| (*I confirm that I agree with the content of this form and revised job summary and that the grading of the post should be reviewed)*. |
| Date:  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  |