New Dynamics

Performance and goals

# Job evaluation and performance assessment

Separate role value from individual contribution and make both decisions easier to explain.

Practical guidance · Worked examples · Printable worksheet

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# Inside this guide



Read in order for the full approach, or use the linked contents to find a section. The final worksheet gives you space to record decisions and next steps.

Separate role value from individual contribution and make both decisions easier to explain. This practical guide to job evaluation brings together a step-by-step approach, illustrative examples, a reusable worksheet and answers to common questions. Start with the section closest to your current challenge, then use the working session to turn the guidance into a clear next action.

## Keep two different questions clear

Job evaluation considers the responsibilities and demands of a role. Performance assessment considers how a person contributed during an agreed period. Mixing them can produce confusing decisions: excellent performance does not automatically mean the role has changed, and a larger role does not prove the person performed well.

Explain which process is being used and what it can decide. If pay, grading or contractual terms may change, involve the relevant specialists and follow the approved local process.

## Describe the role as it actually exists

Use a current role description that covers purpose, principal responsibilities, decision authority and working relationships. Validate it with people who understand the work. Avoid writing the role around one exceptional incumbent or a hoped-for future expansion.

Choose an approved evaluation method and consistent factors appropriate to the organisation. Possible considerations include knowledge, responsibility, complexity and impact. Do not create a scoring scheme without testing its meaning, fairness and relationship to the existing role framework.

## Assess contribution against agreed expectations

For performance, consider goals, examples of work, context and role-relevant behaviours. Review the full period and changes in priorities or scope. Include less visible contributions such as maintaining a service or helping others avoid errors.

Let the employee provide context and correct inaccuracies. Record why the evidence supports the conclusion. A review should be understandable without relying on the manager’s private impression of the person.

## Worked example: an expanded analyst role

Illustrative scenario: an analyst receives strong feedback and has also begun coordinating a recurring cross-team process. The manager separates the questions.

The performance discussion reviews the quality and impact of the analyst’s work. A role review checks whether coordination is now an enduring responsibility with additional decision authority. If it is temporary cover, that context is recorded. If the role has materially changed, the approved evaluation process considers its level. One favourable review does not substitute for either analysis.

## Two-part assessment worksheet

- **Role purpose:** What ongoing organisational need does the job fulfil?
- **Responsibilities:** What decisions and outcomes belong to the role?
- **Scope change:** What has changed, since when and with whose approval?
- **Performance expectations:** What was agreed for this review period?
- **Contribution evidence:** What work and impact can be inspected?
- **Context:** Which dependencies or changes affected the result?
- **Decision route:** Who owns role evaluation and who owns performance assessment?

Keep separate records where the purposes and access needs differ. Do not disclose another person’s pay or review details as an informal comparison.

## Explain and review the outcome

Communicate which question was answered, which criteria were used and where the employee can ask for clarification or a review under the organisation’s process. Record unresolved concerns fairly.

Check whether comparable roles are described and evaluated consistently. For performance, calibrate the interpretation of evidence rather than forcing employees into an arbitrary distribution. Use the compensation framework for the decision process around pay and the performance review guide for the conversation itself.

## Put the guide into practice

Set aside a working session with the people who own this process and one or two people who experience it. Use a fictional or appropriately authorised case, so the discussion can be specific without sharing unnecessary personal information. The purpose is to leave with a usable decision or document, not just agreement that the topic matters.

### Prepare the case

Create two fictional descriptions of the same role: its approved responsibilities and the work currently being performed. Identify which differences are enduring, temporary or unapproved. Ask whether the question concerns the role’s scope or the individual’s contribution. Keep those two decisions separate throughout the exercise.

Write the starting assumptions down before discussing solutions. If the group disagrees on what happened, identify the information needed to resolve that difference rather than building a plan on an untested story.

## Work through the decision

Apply the organisation’s approved evaluation factors to the role description. Record the evidence for responsibility, complexity or other relevant factors without referencing the incumbent’s popularity. Then assess a separate performance example against agreed expectations. Notice where the group is tempted to use one conclusion as a shortcut for the other.

Ask each participant to explain the proposed decision in their own words. Differences in interpretation often reveal an unclear criterion, a missing responsibility or an instruction that will be difficult to follow.

## Test an exception

Introduce temporary cover for a more senior colleague or a one-off successful project. Decide what additional information is needed before concluding that the role has permanently changed. Check how acting arrangements or temporary responsibilities are handled under the approved policy rather than improvising a grading decision.

Record what changes in this situation and what remains the same. An exception should lead to a clear next step, with an owner, rather than an informal workaround that nobody can explain later.

## Agree the handoff

Prepare separate explanations for the role evaluation and performance assessment. Confirm who owns each decision and which records or approvals are required. The employee should understand what was considered, what remains unresolved and where they can ask for a review under the applicable process.

Finish by confirming the owner, the next action and the date when the result will be reviewed. Give the person receiving the work enough context to continue without repeating the whole discussion.

# Frequently asked questions

### Is job evaluation the same as a performance appraisal?

No. Job evaluation concerns the role’s responsibilities and demands; a performance appraisal concerns a person’s contribution during a period. The two can inform different decisions and may be discussed near the same time, but they require different evidence. Keeping them separate helps avoid rewarding a role description for an individual’s success or judging a person solely by the size of their role.

### Does doing extra work mean a role needs regrading?

Additional work may justify reviewing the role, but the nature, duration and responsibility matter. Temporary cover, greater volume and a permanent change in decision authority are different situations. Use the approved role-evaluation process and relevant local arrangements. Document what changed and when rather than treating any extra task as automatic evidence for a new grade.

### How can evaluation be made more consistent?

Use current role descriptions, clear factors, trained reviewers and documented reasons. Test the method on representative roles and examine differences in interpretation. Avoid assuming that similar titles mean equivalent work or that a complex scoring table guarantees fairness. Provide an appropriate review route and maintain the framework when organisational responsibilities change.

# Review the first cycle

Check whether employees and managers can explain the difference between the two decisions. Review whether role descriptions reflect current work and whether performance conclusions use period-specific evidence. Where recurring disputes arise, examine the criteria and ownership rather than adding more scoring detail without a clear purpose.

Keep a brief record of what was tried, what participants found useful and what needs to change. Compare the result with the original problem rather than judging success only by completion. If the process created extra work without improving clarity, quality or support, simplify it and test again. Share the agreed change with the people who will use it, and name the person responsible for keeping the guidance current.

# About New Dynamics

New Dynamics connects goals, feedback, recognition and reviews around the way organisations work. This guide is published by the New Dynamics Editorial Team as part of our practical library for HR leaders, managers and People teams.

Use the examples and worksheets to structure your own discussions and adapt them to your organisation. Illustrative scenarios are not customer case studies. Policy and employment guidance needs appropriate local review before adoption.

For questions about this guide, corrections or a conversation about your performance management process, email contact@new-dynamics.com. Explore the complete guide library for related resources.

# Your working worksheet

Use the prompts from this guide to prepare one real conversation or decision. Keep personal or sensitive information in your organisation’s approved records. This page is for your own working notes.

**Role purpose:** What ongoing organisational need does the job fulfil?

**Responsibilities:** What decisions and outcomes belong to the role?

**Scope change:** What has changed, since when and with whose approval?

**Performance expectations:** What was agreed for this review period?

**Contribution evidence:** What work and impact can be inspected?

**Context:** Which dependencies or changes affected the result?

**Decision route:** Who owns role evaluation and who owns performance assessment?

Discuss your next step with New Dynamics: contact@new-dynamics.com