



# JOB MATCHING AND EVALUATION POLICY

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## History

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1	May 2017	New policy compiled from information previously contained in Pay Policy for Non-Medical Staff	TEC

For more information on the status of this document, please contact:	Lucy Purdy, Asst Dir of HR, Business Partnering
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**ASHFORD & ST PETER'S HOSPITALS NHS FOUNDATION TRUST**

**JOB MATCHING AND EVALUATION POLICY**

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# ASHFORD & ST PETER'S HOSPITALS NHS FOUNDATION TRUST

## JOB MATCHING AND EVALUATION POLICY

### 1. INTRODUCTION

- 1.1 For the majority of non-medical staff within the NHS, the NHS Job Evaluation Scheme is used as a means of determining pay bands for posts. The purpose of this system, known as Agenda for Change, is to ensure equal pay for work of equal value.
- 1.2 This Policy and Procedure describes the local implementation of the NHS Job Evaluation Scheme at the Trust which is fair, non-discriminatory and collectively agreed.

### 2. DEFINITIONS

- 2.1 **Job matching:** The process of assessing the content of a job against nationally agreed profiles to determine a pay grading.
- 2.2 **Local job evaluation:** A process of analysing the content of a job, in order to determine a pay band, where an appropriate national profile does not exist.
- 2.3 **Consistency checking:** A process, undertaken by trained HR and staffside personnel, of checking the outcome of a matching or evaluation panel's decision against the national profiles and any available benchmarking data.

### 3. SCOPE OF POLICY

- 3.1 This Policy and Procedure applies to all non-medical and non-dental employees of the Trust with the exception of very senior managers and Directors.
- 3.2 All non-medical and non-dental Bank staff job descriptions are matched (or evaluated) in line with this policy as a means of determining banding.

### 4. RESPONSIBILITIES

#### 4.1 Workforce and OD

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- In collaboration with staff side, to update the policy and procedure ensuring that it is up to date with current best practice and guidance
- To provide advice and guidance on the application of the policy
- To arrange regular training for staff in the matching, analysis and evaluation processes of the NHS Job Evaluation Scheme and to keep a register of names of practitioners and trainers
- To organise regular job matching panels and facilitate consistency checking
- To ensure that all panellists and consistency checkers are appropriately trained
- To keep a confidential record of the members of each convened panel in case of subsequent queries regarding the process
- To keep a database of matched jobs and National profiles
- To provide advice and guidance to managers on job role design

#### 4.2 **Staff side**

- To engage with and promote the policy
- to provide advice and guidance on the application of the policy
- Once trained in the job matching process, to commit to a minimum of 6 panels per year
- to promote and support the availability of staff side panellists

#### 4.3 **Staff**

- to follow the procedures set out in the policy
- once trained in the job matching process, to commit to a minimum of 6 panels per year
- to follow the procedure set out if they believe that their job has substantially changed and requires re-matching

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#### 4.4 **Managers**

- To ensure that job descriptions and person specifications are written using the agreed Trust template available on the intranet
- To regularly review jobs to ensure that they accurately reflect staff's roles, responsibilities and place within the team structure
- To submit new and substantially changed posts to a matching panel before recruitment commences, ensuring that appropriate paperwork is attached
- To ensure that staff trained in job matching are given sufficient release time to participate on panels

### 5. **JOB MATCHING**

#### 5.1 **New or vacant posts**

- Line managers should consider whether to replace vacant posts with a similar post or to evaluate the needs of the service and create a new role in line with service improvement.
- All new posts and posts which have substantially changed since they were last matched (or evaluated) are required to be submitted for job matching before recruitment may commence.

#### 5.2 **Changed jobs**

- All posts change over a period of time. For most, the job matching (or evaluation) outcome will not normally be affected unless there are significant changes. However, some job outcomes may be close to band boundaries and consequently the banding for these jobs may change with only limited changes to job demands.
- Where a post holder and their manager agree that the demands of the post have changed, then a re-matching of the post needs to be carried out. A request must be submitted using Appendix 1.
- Where a request for re-matching has been made, the post holder must submit evidence showing which skills and responsibilities or other demands of the job have changed.

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- Where a new banding is confirmed, this will take effect from the date of the outcome of the consistency check and pay will be adjusted from this date.
- It is the manager's responsibility to submit a Change of Employment Details Form to Employee Services to advise of an adjustment to banding.

### 5.3 Routine recruitment and other exceptions

- For routine recruitment to established vacant posts and additional funded posts where an existing and accurate job description exists, matching is not necessary and you should use the outcome already determined.
- When a job description, submitted for consideration by a matching panel, is found to be sufficiently similar to a post already in existence, a member of the Employee Relations or Business Partnering team will confirm this, following assessment and clustering against the existing job match report. In this circumstance, there will be no need for the job to be formally matched and the pay band confirmed on the job match report will be used.
- The pay for very senior managers will continue to be determined outside of the Agenda for Change job matching process.
- The pay for doctors and dentists is determined by other national agreements.
- In exceptional circumstances, posts may be appointed to on an 'acting' or interim basis prior to a job being formally matched. This must be agreed by an Assistant Director of HR and an Associate Director of Operations (or equivalent in corporate areas) and will be appropriate where there is a pressing service need. In such situations, an indicative band for the post will be provided by the HR Business Partner and the job should be submitted for matching as soon as possible. The application of the formal job matching outcome will be backdated to the start date of the acting period where the outcome is higher than the indicative band given. Where the formal job matching outcome is lower than the indicative band given, the new banding will take effect from the day after the outcome is communicated to the staff member. It is the manager's responsibility to ensure that the acting staff member is in agreement with these terms before the acting period commences.

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## 6. MATCHING PANELS

- 6.1 Matching will be carried out by a joint matching panel comprising of both management and staff representative members. For the purposes of job matching, staff side means a Recognised Trade Union Rep. All members must have been trained in the NHS Job Evaluation Scheme, which includes an understanding of the avoidance of bias. The members must also be committed to partnership working. The number of members per panel is three.
- 6.2 Confidentiality will be maintained in respect of the jobholder's personal details (such as name & gender) which are not disclosed to panel members. Similarly, the names of individual panel members are not disclosed to jobholders. This is in order to protect panel members from any attempts to introduce factors into the process that could lead to bias.

## 7. CONSISTENCY CHECKING

- 7.1 All matched jobs will be consistency checked by a minimum of two trained staff including one member from the Workforce and OD team and one member from staff side. The purpose of the consistency check is to check the post against the national profile and any available benchmarking data. The consistency checkers will either:
- agree with the matching panel's decision and rationale
  - make some amendments to the scores / factor descriptions
  - refer the post back to a matching panel for further consideration
- 7.2 Consistency checks may be undertaken remotely.

## 8. LOCAL JOB EVALUATION

- 8.1 Exceptionally, a job is created which has no national evaluation profile and attempts to match it are therefore unsuccessful. This is most likely to affect senior managerial posts, or jobs in specialist areas such as IT or public relations. In this scenario, the job will be referred by the matching panel for local job evaluation.

## 9. MATCHING PROCEDURE

- 9.1 The line manager will write or amend the Job Description and Person Specification in line with service needs

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- 9.2 The Job Matching Request Form (Appendix 1) must be completed and submitted along with the Job Description and Person Specification to [Asp-tr.jobevaluation@nhs.net](mailto:Asp-tr.jobevaluation@nhs.net)
- 9.3 A job matching panel will assess the job, within 2 weeks of submission, against the National profiles in line with Section 11 of the Job Evaluation Handbook.
- 9.4 Jobs submitted for matching with all necessary paperwork attached will be considered within 2 weeks' of submission. The line manager will be informed about the date and time of the matching panel and should (if possible) be available over the phone to answer any questions or provide further information if required by the panellists.
- 9.5 If the panellists are unable to match the job against a national profile, the line manager will be informed and may be required to provide additional information.
- 9.6 Where the panellists agree that there is no relevant national profile (exceptional), the job may be sent for local job evaluation (see section 8 & 10).
- 9.7 If the job description is successfully matched, the panel outcome will be sent for consistency checking (see section 7). Consistency checking may take up to 5 working days to complete.
- 9.8 The consistency check will either confirm the banding to the manager, or refer the job back to the next available panel for further consideration. In this event, the line manager may be asked to provide additional information.

## 10. LOCAL EVALUATION PROCEDURE

- 10.1 If local job evaluation is required, this will be carried out in line with Section 13 of the Job Evaluation Handbook. Advice and guidance on the process will be available from the Employee Relations and HR Business Partnering teams.

## 11. APPEALS

- 11.1 There is no individual right of appeal against a matching or job evaluation outcome. Any complaint that the process has not been fairly applied should be addressed using the Trust's Grievance Policy.

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## **12. TRAINING**

12.1 Regular training in matching, analysis and evaluation will be arranged by the Workforce and OD team for staff who would like to act as panellists. Training must be completed before joining a matching panel or consistency checking.

## **13. STAKEHOLDER ENGAGEMENT AND COMMUNICATION**

13.1 This policy and procedure reflects a collectively agreed national process which has been adapted for local use in collaboration with staff side.

## **14. APPROVAL AND RATIFICATION**

14.1 Approval of this policy is via Employee Partnership Forum (EPF) and Trust Executive Committee (TEC).

## **15. DISSEMINATION AND IMPLEMENTATION**

15.1 The policy will be published on Trustnet and communications sent directly to Divisional and Corporate management meetings.

15.2 The policy will be reviewed jointly with staffside in line with the Trust policy.

## **16. MONITORING COMPLIANCE WITH THIS POLICY**

16.1 The Recruitment Team are responsible for ensuring that recruitment does not commence prior to job matching or evaluation taking place.

16.2 The Assistant Director of HR, Business Partnering is responsible for the monitoring compliance with this policy.

16.3 All matching and evaluation outcomes will be held centrally by the Workforce and OD team and data will be available for audit as required.

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## 17. SUPPORTING REFERENCES

- 17.1 NHS Terms and Conditions of Service (Agenda for Change) Handbook:  
[http://www.nhsemployers.org/employershandbook/afc\\_tc\\_of\\_service\\_handbook\\_fb.pdf](http://www.nhsemployers.org/employershandbook/afc_tc_of_service_handbook_fb.pdf)
- 17.2 Job Evaluation Handbook:  
<http://www.nhsemployers.org/~media/Employers/Documents/Pay%20and%20reward/JE%20Handbook%20fifth%20edition/NHS%20Job%20Evaluation%20Handbook%20-%20sixth%20edition.pdf>

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**Appendix 1**

**JOB MATCHING REQUEST FORM**

This form must be submitted with the job description, person specification and organisation structure to [Asp-tr.jobevaluation@nhs.net](mailto:Asp-tr.jobevaluation@nhs.net). Failure to submit a fully completed form with the documents will result in the documentation not being logged or scheduled for matching.

<b>Post Title:</b>		<b>Current Band (if applicable):</b>	
<b>Department:</b>		<b>No. of Post-holders:</b>	
<b>Line Manager Name:</b>		<b>Signature:</b>	
<b>Line manager's contact details:</b>			
<b>Reason for job matching request:</b>	<input type="checkbox"/> Part of restructure/consultation (vacant) <input type="checkbox"/> New post (vacant) <input type="checkbox"/> Review of current post (vacant) <input type="checkbox"/> Review of current post (post held)		
<b>Post titles of any existing jobs which you consider have comparable responsibilities and band in the Trust :</b>			
<b>If there is a current postholder, what was the effective date of change from the old job description to the new job description?</b>			
<b>If any new duties have been transferred from another post, give the title of the other job concerned:</b>			

<b>1. Does the post holder use any equipment?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No  If yes, please provide details:
<b>2. What physical movement is required in the job?</b>	Select all that apply and indicate the frequency  <input type="checkbox"/> Standing

	<input type="checkbox"/> Walking <input type="checkbox"/> Crouching <input type="checkbox"/> Bending <input type="checkbox"/> Climbing <input type="checkbox"/> Crawling <input type="checkbox"/> Sitting <input type="checkbox"/> Kneeling
<b>3. Is the post holder required to do any of the following?</b>	Select all that apply and indicate the frequency <input type="checkbox"/> Use a keyboard <input type="checkbox"/> Work at height <input type="checkbox"/> Push or pull trolleys <input type="checkbox"/> Administer IV injections <input type="checkbox"/> Perform surgical interventions
<b>4. Is the post holder required to lift equipment/weights with or without mechanical aids?</b>	Approximate weight. Indicate the frequency. <input type="checkbox"/> Less than 6kg <input type="checkbox"/> 6-15kg <input type="checkbox"/> Over 15kg <input type="checkbox"/> Not applicable
<b>5. Does the posts holder have to move between different work areas, locations etc?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No  If yes, please provide details:
<b>6. Is the pattern of work predictable in nature?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No  If no, please provide details:
<b>7. Does the job require a high level of concentration? Is it intense in nature? How often is this the case?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No  If yes, please provide details:
<b>8. Is there an emotional involvement with patients and staff in difficult circumstances, whether face to face or over the telephone, e.g. imparting bad news</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No  If yes, please provide details:
<b>9. Is the post holder exposed directly or indirectly to</b>	<input type="checkbox"/> Yes

<p><b>emotionally or distressing circumstances/situations?</b></p>	<p><input type="checkbox"/> No</p> <p>If yes, please provide details:</p>
<p><b>10. Please briefly describe the working environment, for example lab, ward, office etc.</b></p>	
<p><b>11. Is the post-holder required to work in, directly with or exposed to any of the following?</b></p>	<p>Select all that apply and indicate the frequency</p> <p><input type="checkbox"/> Extreme heat/cold</p> <p><input type="checkbox"/> Smells</p> <p><input type="checkbox"/> Noise</p> <p><input type="checkbox"/> Fumes</p> <p><input type="checkbox"/> Dangerous chemicals</p> <p><input type="checkbox"/> Unpleasant substances</p> <p><input type="checkbox"/> Infectious materials</p> <p><input type="checkbox"/> Foul linen</p> <p><input type="checkbox"/> Bodily fluids</p> <p><input type="checkbox"/> Faeces</p> <p><input type="checkbox"/> Tissues</p> <p><input type="checkbox"/> Other (please specify)</p>