

## JOB EVALUATION AND RE-BANDING POLICY

		POLICY	
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	X		
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## APPENDICIES

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## 1.0 INTRODUCTION

- 1.1 This policy aims to give clarity on the procedure for re-banding posts that fall within the scope of Agenda for Change, either on a substantive or a temporary basis.
- 1.2 This policy has been drawn up in line with the NHS Job Evaluation Scheme, which is based on the principle of equal pay for work of equal value and should be read in conjunction with this policy. The details of the scheme are laid out in the NHS Job Evaluation Handbook, which can be found on the NHS Employers website at [NHS Job Evaluation Handbook | NHS Employers](#).

## 2.0 POLICY STATEMENT

- 2.1 It is recognised that posts often change, or evolve over time, or new posts are developed as a requirement of service, or organisational change. This policy has been prepared as part of the Agenda for Change (AfC) partnership working model, to provide a mechanism whereby posts can be subject to the AfC matching / evaluation procedure to recognise essential role changes.
- 2.2 Only significant changes within a job role are likely to affect matching or evaluation. These changes must be based on increased responsibility and not normally increased volume of work or length of service. When a job is identified as having changed significantly, a decision needs to be made by the job evaluation panel as to whether this is likely to match a national profile.
- 2.3 This policy applies to both temporary and permanent changes to post.
- 2.4 It is recognised that on occasions, a post may change less significantly, where the change is not significant enough to warrant a change to the banding AND to the factor weighting. On these occasions, the minor amendment process will prevail.
- 2.5 A revised job description cannot be processed until a Job Evaluation Request form has been authorised by all signatories, including the line manager, service lead, representative from the People Directorate and an Executive Director.
- 2.6 A revised job description must be reflective of the requirements of the post, not on the actual skills, knowledge or experience of the post-holder.
- 2.7 Best practice dictates that when specialist roles are being considered, the professional lead should be consulted with regarding the content of the job description and person specification (e.g Nursing, Finance, People Directorate etc).
- 2.8 Services / Departments must not progress a matching request that may impact upon similar jobs in other services across the Trust without consulting with the other affected services. This process must involve oversight from the Divisional People Team and must be evidenced in the Job Evaluation Request form.

### **3.0 DEFINITIONS/ ABBREVIATIONS**

AfC – Agenda for Change  
JE – Job Evaluation  
IJES – Intelligent Job Evaluation System  
JER Form – Job Evaluation Request Form  
VCP – Vacancy Control Panel  
JAQ – Job Analysis Questionnaire

### **4.0 ROLES AND RESPONSIBILITIES**

#### **4.1 Responsibilities of the Operational HR Team**

4.1.1 Responsible for administering the job evaluation process, including booking job descriptions into panels, uploading documentation onto IJES and sending posts onto the Consistency Checking and Job Evaluation Lead.

#### **4.2 Responsibilities of the Divisional People Team**

4.2.1 Provide advice and guidance on the contents of a job description.

4.2.2 Be an authorised signatory for a job evaluation request form.

#### **4.3 Responsibilities of Line Managers**

4.3.1 Responsible for ensuring all requests are dealt with in a timely, fair and equitable manner in line with this policy.

4.3.2 Managers are responsible for ensuring that job descriptions are maintained and updated so that they accurately reflect the current reality of the duties.

4.3.3 Ensure that staff are not routinely expected to perform duties beyond the remit of their job description and level of remuneration.

#### **4.4 Responsibilities of Staff Side**

4.4.1 Responsible for being involved at each stage of the job evaluation process, from job matching panels to consistency checking.

#### **4.5 Responsibilities of Job Evaluation / Matching Panellists**

4.5.1 Responsible for matching job descriptions to job profiles, and applying the principles as set out in the NHS Job Evaluation Handbook.

## 5.0 APPROVAL

JSPF

## 6.0 DOCUMENT REQUIREMENTS

### 6.1 Job Evaluation Process

- 6.1.1 The process is to enable an individual, group of employees or the manager of a service to have appropriate access to an independent review of the band assigned to a post(s).
- 6.1.2 This process should be used to determine the appropriate band for posts covered by all AfC employees. This excludes bank workers, Medical and Dental staff and VSM.
- 6.1.3 The Job Evaluation process is based on a number of clear principles and partnership working between the Trust and Staff Side.
- 6.1.4 The Job Evaluation Handbook sets out protocols in relation to the process of matching jobs against National Job Profiles and in relation to local job evaluations.
- 6.1.5 It is the post that is matched or evaluated, not the individual(s) who are in post at any given time.
- 6.1.6 Any change in the band of a post that results from an application for re-evaluation will be backdated to the date of the job evaluation panel. There is no provision for backdating. The individual will be placed on the first point of the new payscale that gives an increase in pay. Please see the Trust's Salary Upon Appointment Guidance document for more information.
- 6.1.7 The Job Matching panels / Job Evaluation panels will consist of a minimum of three panellists, which include a combination of management representative and Staff Side representatives.
- 6.1.8 The Consistency Checking panel will consist of a management representative and a Staff Side representative, and neither panellist must have sat on the original Job Matching / Job Evaluation panel for the role being considered.
- 6.1.9 Consistency Checking will meet weekly, or as often as required, dependent on the volume of jobs. The purpose of the meeting will be to carry out consistency checking of results and to consider any process / technical issues relation to job evaluation.
- 6.1.10 Following Consistency Checking, all jobs submitted for evaluation or matching will be sent to the JE Lead for the Trust for final sign off. Outcomes will not be communicated to the manager or postholder until after this stage.
- 6.1.11 Managers will be required to liaise with clinical professional leads and the Divisional People Team in reviewing and developing job descriptions in order to ensure a consistent approach across the Trust.

- 6.1.12 The Trust has a number of generic job descriptions, which can be used across the organisation. A repository of job descriptions is maintained by the Operational Team and can be available upon request from the Team.
- 6.1.13 Posts will not be considered within 12 months of a previous matching and evaluation review, unless there is a clear evidence to demonstrate significant changes to the role and responsibilities, or a relevant new national profile is published.
- 6.1.14 This does not supersede the AfC Terms and Conditions which states any new role with newly appointed post holders can request a review within 3 months of commencement.

## **6.2 New posts – prior to recruitment**

- 6.2.1 The Recruiting Manager is responsible for drafting a comprehensive job description and person specification which accurately reflect the duties required of the post and the skills and abilities required of the person in post. Advice on the content of a job description / person specification can be sought from the Divisional People Team.
- 6.2.2 Once complete, the job description and a fully signed off JER Form must be submitted to the Job Evaluation e-mail inbox. Where a JER Form is not fully signed off, the documents will be returned to the Recruiting Manager, and will not be booked into a panel.
- 6.2.3 Once all documents have been appropriately received, the job description will be booked into the nearest available job matching / job evaluation panel.
- 6.2.4 Where Vacancy Control Panels are invoked, a new job description will be subject to VCP approval as an additional step and will not be booked onto any panel until VCP approval is received.
- 6.2.4 Recruitment can only take place, once the banding has been determined as per the outlined process above.

## **6.3 Updated Job Descriptions**

- 6.3.1 The Job Matching / Job Evaluation procedure is based on an agreed and up to date job description and person specification. Therefore it is extremely important the Line Manager and the post holder(s) agree the contents of the job description and the person specification.
- 6.3.2 Where the line manager and post holder(s) agree on the content of a job description, the agreed job description and a fully signed off JER Form must be submitted to the Job Evaluation e-mail inbox. Where a JER Form is not fully signed off, the documents will be returned to the Recruiting Manager, and will not be booked into a panel.
- 6.3.3 Once all documents have been appropriately received, the job description will be booked into the nearest available job matching / job evaluation panel.

- 6.3.4 Where VCP's are invoked, an updated job description will be subject to VCP approval as an additional step as described in 6.2.4
- 6.3.5 Where the job matching / job evaluation panel sees a change in banding, a change form can only be completed once the banding has been determined, as per the outlined process above.
- 6.3.6 Where a line manager and post holder(s) fail to agree on the accuracy of a job description / person specification, the matter should be referred to an independent objective manager within the Trust, in consultation with a HR Representative for a final decision. The job matching procedure will not commence until the final outcome has been reached.

## **6.4 Review Procedure**

- 6.4.1 Should a manager or a post holder be dissatisfied with a job matching outcome, they have the right to request a review. The appropriate review documentation must be completed, and agreed by both the line manager and the postholder(s).
- 6.4.2 Completed review documentation must be sent to the Job Evaluation inbox within three months of the date of the outcome from the original job matching panel. No reviews will be considered outside of this time frame.
- 6.4.3 Where VCP are invoked, a review will be subject to VCP approval as an additional step. Please see 6.2.4.
- 6.4.4 The review documentation will be considered at a new job matching panel, with new matching panellists. They will consider the original matching outcomes based on the new information provided on the review documentation.
- 6.4.5 Reviewed job descriptions are also subject to the Consistency Checking process, and must be signed off by the JE Lead.
- 6.4.6 Where the panel sees a change in banding, a change form can only be completed once the banding has been determined, as per the outlined process above.
- 6.4.7 This is the end of the internal process, and the decision of these panels will be final.

## **6.5 JAQ Procedure**

- 6.5.1 In the event that there has been an unsuccessful attempt to match to one or more national profiles, or where there is no potential national profile available to match due to the post being unique or slightly different, the post will be referred for evaluation.
- 6.5.2 A Job Analysis Questionnaire (JAQ) must be completed and agreed by the manager and postholder(s), with support and guidance from trained evaluators.

## **6.6 Job Matching / Evaluation Complaints Procedure**

- 6.6.1 An individual has the right to invoke the Grievance Procedure, if they are dissatisfied with the application of this policy and associated procedure.

The procedure relating to this policy must be exhausted in the first instance

- 6.6.2 A Grievance is not to request further panel considerations, and cannot be applied against the matching result of a pay band.
- 6.6.3 The grievance must detail the details of where the postholder(s) feel the matching or evaluation process was misapplied, and evidence to support the case.
- 6.6.4 Further details regarding the process can be found in the Trust's Grievance Policy.



## 7.0 MONITORING COMPLIANCE AND EFFECTIVENESS

<b>Minimum Requirement to be Monitored</b>  (WHAT – element of compliance or effectiveness within the document will be monitored)	<b>Responsible Individual</b>  (WHO – is going to monitor this element)	<b>Process for Monitoring e.g. Audit</b>  (HOW – will this element be monitored (method used))	<b>Frequency of Monitoring</b>  (WHEN – will this element be monitored (frequency/ how often))	<b>Responsible Individual or Committee/ Group for Review of Results</b>  (WHERE – Which individual/ committee or group will this be reported to, in what format (eg verbal, formal report etc) and by who)
Policy Implementation	People Operational Lead	Audit	Monthly	JSPF

## **8.0 TRAINING AND IMPLEMENTATION**

The People Directorate will provide managers with appropriate training in relation to the writing of a Job Description.

## **9.0 IMPACT ASSESSMENTS**

This document has been subject to an Equality Impact Assessment, see completed form at Appendix A.

This document is not subject to an Environmental Impact Assessment.

## **10.0 EVIDENCE BASE (Relevant Legislation/ National Guidance) AND RELATED SFHFT DOCUMENTS**

### **Evidence Base:**

- NHS Job Evaluation Handbook

### **Related SFHFT Documents:**

- Job Evaluation Guidance
- Salary Upon Appointment Guidance
- Grievance Policy

## **11.0 KEYWORDS**

Job Evaluation

## **12.0 APPENDICES**

Appendix A – Equality Impact Assessment (EQiA)

## **APPENDIX 1 - EQUALITY IMPACT ASSESSMENT FORM (EQIA)**

<b>Name of service/policy/procedure being reviewed:</b> Job Evaluation And Re-Banding Policy			
<b>New or existing service/policy/procedure:</b> Job Evaluation And Re-Banding Policy			
<b>Date of Assessment:</b> April 2024			
<b>For the service/policy/procedure and its implementation answer the questions a – c below against each characteristic (if relevant consider breaking the policy or implementation down into areas)</b>			
<b>Protected Characteristic</b>	<b>a) Using data and supporting information, what issues, needs or barriers could the protected characteristic groups' experience? For example, are there any known health inequality or access issues to consider?</b>	<b>b) What is already in place in the policy or its implementation to address any inequalities or barriers to access including under representation at clinics, screening?</b>	<b>c) Please state any barriers that still need to be addressed and any proposed actions to eliminate inequality</b>
<b>The area of policy or its implementation being assessed:</b>			
<b>Race and Ethnicity</b>	N/A	N/A	N/A
<b>Gender</b>	N/A	N/A	N/A
<b>Age</b>	N/A	N/A	N/A
<b>Religion / Belief</b>	N/A	N/A	N/A
<b>Disability</b>	N/A	N/A	N/A
<b>Sexuality</b>	N/A	N/A	N/A
<b>Pregnancy and Maternity</b>	N/A	N/A	N/A
<b>Gender Reassignment</b>	N/A	N/A	N/A
<b>Marriage and Civil Partnership</b>	N/A	N/A	N/A
<b>Socio-Economic Factors</b>	N/A	N/A	N/A

(i.e. living in a poorer neighbourhood / social deprivation)			
<b>What consultation with protected characteristic groups including patient groups have you carried out?</b> <ul style="list-style-type: none"> <li>JSPF sub-group</li> </ul>			
<b>What data or information did you use in support of this EqIA?</b> <ul style="list-style-type: none"> <li>Monitoring data from IJES</li> </ul>			
<b>As far as you are aware are there any Human Rights issues be taken into account such as arising from surveys, questionnaires, comments, concerns, complaints or compliments?</b> <ul style="list-style-type: none"> <li>No</li> </ul>			
<b>Level of impact</b>  From the information provided above and following EQIA guidance document Guidance on how to complete an EIA ( <a href="#">click here</a> ), please indicate the perceived level of impact:  Low Level of Impact  For high or medium levels of impact, please forward a copy of this form to the HR Secretaries for inclusion at the next Diversity and Inclusivity meeting.			
<b>Name of Responsible Person undertaking this assessment: Jacqueline Read</b>			
<b>Signature: J Read</b>			
<b>Date: April 2024</b>			