

JOB EVALUATION – BANDINGS AND REVIEW POLICY



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For you.**



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PART 1

HR POLICIES JOB EVALUATION – BANDINGS AND REVIEWS

1. POLICY STATEMENT

Under Agenda for Change, the NHS Job Evaluation Scheme was introduced in order to ensure equal pay for work of equal value. All posts within the scope of the organisation will be matched or evaluated under this scheme via partnership panel decisions as set out in the NHS Job Evaluation Handbook and using an appropriate recording system.

2. PRINCIPLES

- 2.1 This policy applies to all employees who are employed on NHS Terms and Conditions under Agenda for Change.
- 2.2 This policy is designed to ensure that all posts within the organisation are dealt with in a fair and consistent manner
- 2.3 Job Evaluation panels will be made up of a combination of individuals from management and staff side that are suitably trained in the matching, analysis and evaluation process of the NHS Job Matching Scheme.

3. PROCEDURE

The procedure is set out in Part 2.

4. EQUALITY

- 4.1 In applying this policy, the organisation will have due regard for the need to eliminate unlawful discrimination, promote equality of opportunity, and provide for good relations between people of diverse groups, in particular on the grounds of the following characteristics protected by the Equality Act (2010); age, disability, gender, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, and sexual orientation, in addition to offending background, trade union membership, or any other personal characteristic.

5. MONITORING & REVIEW

- 5.1 The policy and procedure will be reviewed. Where review is necessary due to legislative change, this will happen immediately.

PART 2

1. PROCEDURE

New Posts – prior to recruitment

- 1.1 The recruiting manager will be 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 the post. Where necessary, managers should seek advice from Human Resources.
- 1.2 Once complete, the job description and person specification should be submitted to Human Resources. A desktop exercise will be carried out in partnership by experienced matching or evaluation panel members, 1 one management and 1 staff-side representative, to determine a provisional pay band.
- 1.3 Recruitment will then take place using the pay band that has been determined. Applicants will be made aware that the post will be subject to further review. Once the post holder has been in the role for at least 6 months and no later than 12 months, the job can be fully evaluated.

New posts – reviews

- 1.4 The job description and person specification should be reviewed by the line manager with the job holder, in line with guidance, to determine whether it still truly reflects the role being undertaken or whether any changes need to be made. Once agreed, the job description and person specification should be signed by the job holder and line manager and then submitted to Human Resources for review. Where there is more than one job holder, then arrangements should be made by the jobholders for a suitable member of staff to be responsible for conveying the opinions of the rest of the job holders and for agreeing the job description and person specification.
- 1.5 If agreement cannot be reached regarding the contents of the job description then contact with Human Resources should be made to try to resolve the issues.

Pre-sift for the Matching process

- 1.6 Human Resources will sift through Published National Profiles and will select appropriate National Profiles to be used by the matching panel for the relevant job type. The selected National Profiles will be made available to the panel.

Evaluation process

- 1.7 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 significantly different, the post will be referred for evaluation.
- 1.8 A draft Job Analysis Questionnaire (JAQ) must be completed by a jobholder(s) seeking advice from colleagues, a supervisor or line manager. A jobholder, or a jobholder representative of the post along with a line manager, will then be interviewed by 2 trained job analysts, one from management side and one from staff side to check, amend if necessary and verify the JAQ. (A jobholder representative, if representing a group of staff may be accompanied by another jobholder for support if they so wish)
- 1.9 Once agreed, the JAQ is signed off by the jobholder, line manager and both job analysts. The agreed and signed off JAQ is evaluated by a joint evaluation panel, with the rationale

and results for each factor entered onto the recording system.

Arrangements for matching/evaluation panels

- 1.10 Each panel will consist of up to 2 management and 2 staff side representatives to ensure partnership working. (minimum of 3 persons). All panel members must be trained in Job Matching or Job Evaluation as appropriate under the NHS scheme.
- 1.11 Any panel member who is unable to attend an arranged meeting *must* inform the panel administrator as soon as possible. If 2 panel members are unable to attend, the session will be re-arranged.

Role of the Chairperson

- 1.12 The panel will elect a chairperson, for the duration of that session. ,

For all job matching and job evaluation panels, the role of the chairperson is to ensure that:-

- There is opportunity for open and frank discussion.
- The discussions are free from bias and perception.
- Members respect the right of each panellist to voice their opinions.
- All relevant documentation is presented.
- The means of access to seek clarification of information has been agreed.
- Consensus of agreement for each factor must be reached.
- The panel remains focused on the job in hand.
- At the end of the job matching/ evaluation session the chairperson *must* ensure ALL paperwork is returned to the panel administrator (no copying of the paperwork is permitted), and inform the panel administrator of any jobs not started/completed due to time constraints or fatigue.
- Agree the contents of the rationale / information to input into recording system.

Recording Information for Matching/Evaluation

- 1.13 Each panel will elect a scribe to record the data to be input into the recording system by the panel's nominated scribe or the recording Administrator and clearly document the levels for each factor with **all** relevant rationale information. The names of each panel member will be recorded via a coding system, to ensure anonymity.
- 1.14 The recording Administrator will ensure all data is fully completed as required (i.e. panel member name codes, dates, job title/job reference code, factor levels/rationale etc). The information recorded onto the system will be made available to the elected Chairperson to check the details for accuracy and completeness.

Administration

- 1.15 The panel administrator will carry out all preparatory work to ensure that the correct paperwork is ready and available prior to the Panel session (i.e. the Job Description, Person Specification, Organisational Chart, etc). They will also ensure a representative is available, either in person or by telephone for any queries that may arise during the panel sessions.

Selection of panel members will be from the resource available within the pool of trained management and staff side representatives.

Panel Discussions/ Decisions

- 1.16 All discussions within the panel *must* remain strictly confidential. The panel *must* reach consensus in their decision on the factor level *and* the rationale for each factor.
- 1.17 The panel *must* reach their final decision on each factor to allow a 'profile match/band match/no match' or to complete the evaluation. Once consensus has been reached the panel members *must* stand by their decision and document their decision.

Contacting Job holders/ Line Managers

- 1.18 If the panel need to ask any questions to help them make a decision; they should agree all the questions they require answers to before contacting Human Resources, the Job-holders or Line Managers. If clarification is sought, the information gathered, including any advice given, should be documented.

Panel Results

- 1.19 Panel results *must* not be released to the post-holder(s) or management at the time of the panel. Human Resources may facilitate a process of 'consistency check', and the results will be released at a later date, once the result has been confirmed. The Band of the post will then be applied to the job type and will include all jobholder's currently undertaking those duties.

Banding outcome

- 1.20 If the post comes out at a higher band, then work will be undertaken to recalculate the salaries of those people affected, and this will be backdated to the start date or when the new/ additional duties or responsibilities started.
- 1.21 In the unlikely event that the post comes out at a lower band than was first agreed, the post holders will potentially be subject to salary protection on a mark time basis.

Consistency checking

- 1.22 Human Resources will arrange for nominated suitably trained management and staff side representatives to carry out consistency checks internally against local matching and evaluations, in order to avoid local banding anomalies and consequent review requests. External checks will also be carried out against national benchmark evaluations in order to avoid jobs getting 'out of line' with similar like for like jobs.

Reviews

- 1.23 In the event that any individual or group of staff feel that the results do not reflect their role, they may request a review provided: -
- The review request is made within 3 months of notification of the original panels banding decision.
 - The post-holder(s) provides details in writing of where they disagree with the evaluation.
 - The post-holder(s) *must* provide additional **relevant** job related evidence to support their case for a review and have this agreed by an appropriate manager.

A review is not permitted purely on the basis that the post-holder is not happy with the outcome. Failure to provide documentary evidence will prevent the review from proceeding.

The request for a review and the supplementary evidence should be sent to Human Resources within three months of the notification of the original banding decision.

- 1.24 The review panel should be made up of a majority of different members from that of the original panel, again working in partnership.
- 1.25 The review panel should carry out a fresh and full match/ evaluation taking into account the additional evidence, not just those factors where the post-holder(s) have shown disagreement.
- 1.26 The decision of the review panel is final and there is no further right of appeal of the outcome. Post holders should be aware that it is possible for bands to go up or down as a result of this process.
- 1.27 If the post-holder can demonstrate that the process was misapplied, they may pursue a local grievance about the process, but not against the match/evaluation and pay band decision.

Changed jobs – re-banding application

- 1.28 If an individual (or group) believes that their role has changed to such an extent that it is likely to affect the matching or evaluation outcome, then they should approach their line manager and agree a new job description and person specification. This should then be submitted to Human Resources who will then instigate the matching and/or evaluation process as previously described.
- 1.29 If there is an increase in the Band due to this process, then it will be a matter for agreement between the post holder(s) and their line manager as to the back dating of any pay increases as appropriate.
- 1.30 If an individual (or group) is unable to get the agreement of their line manager that their post has changed, they should contact a Human Resources representative who will organise a meeting in an effort to resolve the issue. If no agreement can be reached, the individual has the right to pursue matters under the Grievance Policy.



Job Evaluation EIA