
Agenda for Change (AfC) job evaluation and matching policy and procedure

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SUMMARY OF POLICY

Based on the principles of partnership working, Solent NHS Trust aim to ensure that job matching, and evaluation continues to be managed in a fair, objective, and consistent manner in accordance with the national NHS Job Evaluation Scheme.

Job matching or evaluation is related to the post and not the individual person who happens to be in the post at any given time.

Who this policy is for:

- All staff employed on NHS Terms & Conditions (Agenda for Change (AfC)).

When it applies:

- Prior to recruiting a new position and there is no suitable job description and person specification to use
- When the responsibilities of the job but not the volume of work have significantly changed, and you wish to apply for the banding of it to be reviewed.
- It is associated with a wider organisation change programme where new roles have been developed and/or significant changes to existing roles will be an outcome.
- Vacancies in a department structure lead to a reorganisation of work and there is a clear need to adjust the duties of a post.

This policy & procedure explains...

- When it is appropriate to request a job matching or job evaluation review
- How the process works and how long it takes
- Who is responsible at the different stages
- Who can provide support with queries
- How it is cross-referenced to our other Policies
- The right to appeal a matching outcome in the event the process has not been followed.

Flowcharts to support this Policy & Procedure are provided within appendix C of this document.

Table of Contents

Item	Contents	Page
1	INTRODUCTION AND PURPOSE	5
2	SCOPE AND DEFINITION	5
3	PROCESS/REQUIREMENTS	6
4	ROLES & RESPONSIBILITIES	9
5	TRAINING	11
6	EQUALITY IMPACT ASSESSMENT	11
7	SUCCESS CRITERIA/MONITORING EFFECTIVENESS OF GUIDE	11
8	REVIEW	12
9	REFERENCES & LINKS TO OTHER DOCUMENTS	12
	Appendixes	
	Appendix A: Job Design Questionnaire	13
	Appendix B: Model template Job Description and person specification	24
	Appendix C: Job Matching Process Flow Charts	28
	Appendix D: Appeal Process	31
	Appendix E: Equality Impact Assessment	33

Agenda for Change (AfC) Job evaluation & matching policy and procedure

1. INTRODUCTION & PURPOSE

- 1.1 Solent NHS Trust is committed to ensuring an equitable and robust pay structure through the application of a fair, consistent, and transparent comprehensive job evaluation system across the Trust for all posts that are subject to Agenda for Change terms and conditions of service.
- 1.2 The Trust is committed to providing equal pay for equal work and to working in partnership with Staff-Side to ensure that this is delivered.
- 1.3 The nationally agreed job evaluation scheme must be used to determine the correct pay band for all posts across the organisation. It is anticipated that the majority of posts will be matched to a national profile.
- 1.4 The scheme will be operated in a robust and transparent manner and in accordance with the agreed procedures detailed in this document.
- 1.5 The procedure will be supported by comprehensive records at each stage which may be used for effective evidencing of decisions, monitoring and audit purposes.
- 1.6 This policy/procedure has been produced in order to assist managers when completing and reviewing job descriptions/person specifications subject to Agenda for Change (AFC).
- 1.7 Under Agenda for Change (AFC) all jobs have to be considered against sixteen separate criteria, to establish the AFC banding that particular job should be placed on (these can be found within appendix A – Job Design form).
- 1.8 In order to match a job, it is important that job descriptions and person specifications are clear and specify exactly what the individual is required to do to undertake the duties of the job. It is the job which is banded not the individual.
- 1.9 A key component of this procedure is that the manager has the opportunity to speak to a trained matcher before they invest time in amending an existing job description or developing a new job description. This will help to prevent any unnecessary delays in the process or re-work at a later date.
- 1.10 Once the job description and person specification for a job has been reviewed (and agreed with the individual, if currently in the job), it can be sent for consideration by a matching panel.
- 1.11 Although the panel will be able to request further additional information, if necessary, it is in everyone's best interest if the original paperwork contains all of the relevant information the panel will require. If in any doubt, it is recommended the manager refer to appendix A.

2. SCOPE & DEFINITIONS

- 2.1 This policy and procedure applies to all directly employed staff employed within the Trust who are employed under Agenda for Change (AfC) terms and conditions. This policy and

procedure do not apply to staff employed under the Doctors and Dentists Terms and Conditions of Employment or the Very Senior Manager Pay Framework (Directors).

- 2.2 Matching occurs when trained panellists consisting of both line management and colleague representatives are able to match a job description to a nationally agreed profile. This profile describes a post which is standard within the NHS and which has many common features with other similar roles. A list of all National Profiles can be accessed on the NHS Employers website at www.nhsemployers.org. Panels can be undertaken by trained panellists, with management and trade union colleagues, in equal number, or we can outsource job matching and consistency checking to a reputable and fully trained third party provider in the interests of efficiency.
- 2.3 Job Evaluation occurs only when it has not been possible to match a post against a national profile because the role is unique and/or significantly different to other similar roles elsewhere in the NHS. Posts which are unable to be matched against a national profile will be evaluated using a Job Analysis Questionnaire (JAQ), which will be agreed by you (if appropriate) and your line manager with support and guidance from trained analysts/evaluators.

3. PROCESS/REQUIREMENTS

- 3.1 Factors considered when matching or evaluating a job.

The sixteen factors considered by the matching panel can be found within appendix A. Each of these factors are weighted. Each submission will be checked by a matching panel to see if the factor weights for the job being considered match one of the many national profiles, within certain boundary criteria.

- 3.2 Development of a job description

- 3.2.1 It is important that each job description contains sufficient information on each of the factors described above. The job design form, which can be found in appendix A has been designed to provide all of the information required to develop a clear and effective job description.

- 3.2.2 Overall, it is important that the job description is specific, measurable, realistic, and timely about the duties that individuals undertake. A copy of the template job description in use within the Trust is enclosed at appendix B.

- 3.3 Development of a Person Specification

- 3.3.1 Person specifications are used to determine the skills and abilities, knowledge and experience which are requirements of the job, and should be used for shortlisting suitable candidates during the recruitment process to help assure only suitable candidates are interviewed. It is generally expected, however, that the successful candidate would have the necessary skills to undertake the job and capacity / ability to develop further over a period of time. The jobseeker should demonstrate within the application and selection process they fulfil the necessary skills and competencies to undertake the job.

- 3.3.2 In the person specification, details of the essential *qualifications* required to undertake the job should be included together with any experience that it is essential in order for the individual to undertake the duties. For example, if the individual needs a degree in nursing this must be specified, as must additional qualifications in health visiting, child protection, cardiology, district nursing, etc. if they are essential for the individual to undertake the duties.
- 3.3.3 The manager also needs to consider the level of *experience* an individual must have before they can undertake the job. Is it possible for example for the individual to be able to undertake the duties if they are recently qualified? Do they need a specified period of time after qualification? Do they need experience managing budgets, handling difficult situations, juggling priorities, counselling skills for example?
- 3.3.4 When specifying requirements of the role it is important to ensure that we recognise our local communities have a wealth of relevant experience and skills which may not have been gained via the usual educational or career routes. In addition, Solent are able to provide reasonable adjustments in the workplace for individuals who require support with access, sight, hearing and neuro-divergencies (for example). So, “requires RSA level 3” may be more appropriately described as “can accurately transcribe meetings with multiple attendees, via audio or in person to a standard of x words per minute”.
- 3.3.5 In all but exceptional circumstances managers should not specify a minimum number of years’ experience required for any job as this does not necessarily relate directly to an individual’s competence and may, in fact, contravene age discrimination legislation.
- 3.3.6 Solent NHS Trust promotes a range of employee friendly working practices and, as such, the recruiting manager should consider which of these options may suit the particular job which is being advertised.
- 3.3.7 It is also important to consider what other *skills* are required in order to undertake the duties. If under a safe system of work an individual is required to be a first aider, then the person specification must reflect this. Alternatively, if it is a genuine occupational requirement, they hold a valid full driving licence or a PSV licence in order to do their duties this must be specified. *Please note a requirement to attend meetings on a variety of sites would not make driving a genuine occupational requirement. Also please remember that holding a UK driving licence does not mean an individual is able to drive in the UK.* In all cases it must be stated that the individual is legally able to work in the UK.
- 3.3.8 When looking at the skills ~~they are~~ required to undertake the duties, managers need to again consider what is essential and what is only desirable. If they must be able to produce complex spreadsheets or databases, then it needs to be recorded. Manual handling, infection control, health and safety procedures should not be forgotten.

A copy of the person specification in use within the Trust provided in appendix B.

3.4 Additional Information

- 3.4.1 The job design form seeks to provide opportunity for the manager to provide supplementary information which would not normally be available from a job description or person specification.

- 3.4.2 An organisational tree which specifies where the individual sits within the service line and Trust should be provided.
- 3.4.3 If a manager wants to ensure they have included all of the relevant information, it is recommended they refer to appendix A – Job Design form.
- 3.5 The process:
 - 3.5.1 Where a manager has identified a need for a new job, or the need to review an existing job then the manager should seek the advice of a trained matcher prior to investing any time into developing a job description. This is to ensure they are following the most appropriate process to resolve the identified need within their team.
 - 3.5.2 When a job becomes vacant, the manager should consider both current and future service needs, taking account of skill mix requirements and job design, and ensuring that any recruitment activities are consistent with the workforce plan for the service. Any relevant factors which have been highlighted by a previous incumbent of the job should also be borne in mind when reviewing a job description for the purposes of recruitment.
 - 3.5.3 Managers will be provided with access to a trained matcher, who they will be encouraged to contact as soon as the need to recruit or develop a new job is identified by emailing JobMatching@solent.nhs.uk . The trained matcher will call the manager by return and:
 - 3.5.3.1 Signpost the manager to a template or existing job description which is appropriate, enabling the job to go straight to recruitment and/or avoiding the need for unnecessary matching.
 - 3.5.3.2 Advise the manager of the substance of the changes they are proposing to make and the most appropriate method of accommodating the changes within our job evaluation/matching and/or pay framework. It may be that the changes the manager is wishing to make are purely contextual and can be met by utilising the department specific section of our template job descriptions, thereby enabling the job to go straight to recruitment and/or avoiding the need for unnecessary matching. Where the changes the manager wishes to make are, in the view of a trained matcher, substantive, then the changes to the job description should be made by the manager using the tracked changes function, to the standard outlined within the Job Design form (appendix A).
 - 3.5.3.3 Or provide the manager with a Job Design Form – which encourages the manager to capture all the relevant aspects of a job, with guidance provided at each stage, to support the development of an effective job description. This form will then be passed to the matching panel who will have all of the information they require to match effectively within the single document. The inclusion of an organisation chart is advised to help set the context for the job. The Job Design form can be located in appendix A. Once a job design form has been used to match the job the contents of the form will be used to develop an inclusive and accessible job description to support effective recruitment to the new job.

- 3.5.4 Following receipt of advice from a trained matcher, the manager must provide the relevant documentation to JobMatching@solent.nhs.uk, the matching team will schedule a panel to take place within 3 weeks of receipt of the correct information (the documentation must provide the relevant information in an appropriate format to enable the panel to match or evaluate the job effectively).
- 3.5.5 Matching panels typically take place once each week based upon the availability of trained management side and staff side matchers.
- 3.5.6 Where the job requires matching the panel will be set up on the Intelligent Job Evaluation System (IJES) by the Matching Administrator and the manager advised accordingly. The manager, or nominated delegate, will be asked to remain contactable to enable any queries to be resolved “on-the-spot”.
- 3.5.7 The Matching Team will select the national job profile most appropriate to the job being matched.
- 3.5.8 The matching panel will usually take place with both management and staff side present at the same time. The panel will use IJES to undertake and capture the results.
- 3.5.9 The job will then be passed for consistency checking. Consistency checking will typically take place once every two weeks. The purpose of consistency checking is to review the outcome of the job matching taking into account the job family (vertical consistency) and equivalent jobs across the organisation (horizontal consistency).
- 3.5.10 Once consistency is complete, the manager will be advised of the outcome by the Matching administrator.
- 3.5.11 The outcome of the matching panel can be appealed (once) with the expectation sufficient evidence will be provided to support the appeal. Any appeal will be undertaken as part of the Job Evaluation/Matching process, Matters relating to job evaluation/matching are not otherwise included in the scope of the Trust’s Resolution Policy
- 3.5.12 The job can be passed for recruitment, or in the case of a bone-fide review of an existing job with an incumbent job holder in place, any change in banding (once approved) can be processed.
- 3.5.13 The resulting job description will be reviewed by the manager and a trained member of the P&OD team to ensure it is on the correct Solent template and is written inclusively to attract a diverse pool of applicants.

A flow chart of the matching and evaluation process is available in appendix C, while appendix D explains the appeal process.

4. ROLES & RESPONSIBILITIES

4.1 Trust Board Responsibilities

The Trust Board has a responsibility to treat staff fairly and equitably and to ensure that pay arrangements comply with Equal Pay legislation. It also has the responsibility to ensure that mechanisms are in place so that when jobs alter, they can be re-assessed. This policy and procedure set out the mechanisms that will operate and the processes that will be followed. The Chief Executive and Executive Directors also have the responsibility to ensure that this procedure is adhered to in the areas of the Trust that they directly manage and for which they have link responsibility.

4.2 Manager's Responsibilities:

- to ensure that staff are aware of this procedure.
- to ensure that job descriptions are accurate and up to date, by undertaking an informal review with job holders on a regular basis, usually at least once annually, during the annual appraisal cycle. Where a role has significantly changed during the period the manager will take appropriate steps (as outlined within this policy & procedure) to understand whether the role requires re-matching.
- to ensure that the appropriate budgeted establishment is available to support a potential change in banding.
- to work in partnership with staff and where appropriate staff representatives when establishing new posts as a result of organisational change or service development.
- to draw up and agree job descriptions, person specifications or complete a job design form as required, dependent upon the circumstances.
- to allow trained matching/evaluation panel members time to participate in panels.
- to provide accurate information to matching/evaluation panels.

4.3 Employee Responsibilities:

Over time job roles develop and it is every employee's responsibility to be flexible to accommodate different ways of working to improve services. If a role significantly develops the job description and person specification for the post may need to be reviewed, updated, and signed when agreed by the manager and post-holders. It is the employees' responsibility and right to co-operate with and contribute to this process. It is also the employee's responsibility to provide accurate information to a panel if the post goes through a matching/evaluation process.

4.4 People & Organisational Development Responsibilities

- People & Organisational Development will arrange panel sessions and schedule posts to be matched/evaluated with managers and post-holders (if any) to attend to provide clarification and further information. The Department will maintain matched/evaluated posts within the Intelligent Job Evaluation System (IJES) and produce information to aid consistency checking to ensure that any results that appear out of line with similar posts are checked to ensure that the system is operating effectively and fairly.
- Information regarding matching and evaluation outcomes will be kept securely and confidentially. Outcomes for new posts and where bandings increase will be notified to the People Services team. Post-holders, if any, and the manager for the post will be notified of the outcome.
- Training for panel members will be arranged by the Department and will be delivered in partnership with staff side.

- 4.5 Staff Side Responsibilities - It is the responsibility of the unions and staff organisations recognised by the Trust to:
- work in partnership with managers when consulted on new posts that are being established.
 - provide a representative(s) to be trained in delivering the job matching and evaluation training and who will deliver that training in partnership.
 - provide representatives who will be trained in the job matching and evaluation processes and participate in panels.
- 4.6 Job Matching/Evaluation Panel Member's Responsibilities Panel members will:
- ensure that confidentiality regarding panel discussions and matching/evaluation outcomes are maintained at all times.
 - carry out the matching and evaluation processes in a fair and equitable manner, recording panel discussions and decisions in the format required.
 - participate in refresher training.
 - commit to participate in panel meetings and will notify the People & OD Department at the earliest opportunity should they not be able to attend their scheduled session.

5. TRAINING

- 5.1 Trained matching panel members have been provided with access to training to use the intelligent job evaluation system (IJES)
- 5.2 Matching refresher training has been provided and will be reviewed annually with the opportunity to shadow experienced matchers.
- 5.3 Trained matchers will be provided with coaching and mentoring to advise and support managers to use and develop good quality job descriptions, at the outset of the process.
- 5.4 Communications will be developed for managers to explain the policy and procedure and to signpost them to advice and support.
- 5.5 Senior managers will be briefed via their Head of People, in order that they can support their line managers to access the right support to develop accurate and meaningful job descriptions.
- 5.6 Where guidance is required, the People & OD department (Matching) team will provide advice and guidance for individual managers as required.

6. EQUALITY IMPACT ASSESSMENT

- 6.1 Solent NHS Trust is committed to treating people fairly and equitably regardless of their age; disability; gender reassignment; marriage and civil partnership; pregnancy and maternity; race; religion or belief; sex; or sexual orientation. An equality impact assessment has been carried out for this guide, which is attached at appendix E, and no significant issues have been identified.

7. SUCCESS CRITERIA / MONITORING EFFECTIVENESS

- 7.1 Compliance and effectiveness of this policy will be monitored through submission of an annual report to the Joint Consultation & Negotiating Committee (JCNC), which will

provide details of the number of posts reviewed by panels, the outcomes and the proportion of roles able to be successfully matched at the first time of presentation to the matching panel.

- 7.2 The Head of People Operations will ensure any subsequent recommendations are undertaken and incorporated into this policy & Procedure if appropriate.
- 7.3 Non-compliance with this policy/procedure will be reported to the Chief People Officer and subject to investigation as appropriate.

8. REVIEW

- 8.1 This document may be reviewed at any time at the request of either staff side or management but will automatically be reviewed 3 years from initial approval and thereafter on a triennial basis unless organisational changes, legislation, guidance, or non-compliance prompt an earlier review.

9. REFERENCES AND LINKS TO OTHER DOCUMENTS

- 9.1 NHS Job Evaluation Handbook - [NHS Employers](#)
- 9.2 NHS Terms and Conditions of service handbook [NHS Terms and Conditions of Service Handbook - NHS Employers](#)
- 9.2 Recruitment procedure
- 9.3 Starting pay and progression procedure.

Appendix A – Designing a new job role questionnaire

Please complete the information below to support the development of a job description and person specification
The role will then be matched

You do not need to supply a separate job description or person specification at this stage

ELEMENTS OF JOB ROLE	DESCRIPTION/EXPLANATION	INFORMATION (MANAGER COMPLETE)
Proposed job title	Ideally “does what it says on the tin”. For example, we recommend Nurse – Diabetic Pathway or, Project Manager – IT Infrastructure, or Human Resources - Adviser	
Overarching description of role Please also indicate if this is a training role i.e., apprenticeship role	For example: Is the first point of contact for all telephone enquiries from members of the public due to attend the chest clinic, colleagues, medical, and other professionals, enquiries are prioritise and passed on to the most appropriate person.	
What is purpose of role? What will be achieved by having this role in your structure? How would success of the role be measured?	For example: Making appointments, explaining the reason for any delay, and dealing with routine. Enquiries of a similar nature are actioned by the individual without reference to others.	
Where does the role sit in the organisation and department structure?	Please provide organisation structure with proposed role positioned within it.	<i>Please paste organisation structure document here</i>
Who does the role report to?	Please provide the job title to which the new role reports into	

<p>Communication & Relationship Skills</p> <p>Measures the skills required to communicate, establish, and maintain relationships and gain co-operation of others.</p> <p>Takes account of skills required to motivate, negotiate, persuade, make presentations, train others, empathise, communicate unpleasant news sensitively and provide counselling and re-assurance. It also takes account of difficulties involved in exercising these skills.</p>	<p>Main type of clients/ patient's individual corresponds with:</p> <p>(e.g., children, stroke patients, mental special needs, elderly or frail, deaf, individuals who have difficulty understanding complex messages or whose first language is not English, bereaved, assault victims, terminally ill.)</p> <p>For example:</p> <p>Composes routine letters and emails on a daily basis, regarding appointments and similar information. More complex letters are typed on behalf of others.</p> <p>It is important to show the level of the work being undertaken and the level of any tact or persuasive skills needed. If the individual is needed to communicate in a language other than English or where there are specific communication difficulties (young children, disabilities) these need to be explicit.</p>	
<p>Knowledge, Training & Experience</p> <p>Theoretical and practical knowledge; professional, specialist or technical knowledge; and knowledge of the policies, practices and procedures associated with the job.</p> <p>Measures all the forms of knowledge required to fulfil the</p>	<p>Please articulate specific minimum qualifications and/or evidence of competencies required to take the role here, or their equivalent. Please refer to the qualification table provided. Please also avoid requesting experience defined by time wherever possible.</p> <p>How much induction does the individual require in order to do the job? (a day, a week, a month, longer than this)</p>	

<p>job responsibilities satisfactorily. This includes theoretical and practical knowledge; professional, specialist or technical knowledge; and knowledge of the policies, practices and procedures associated with the job.</p> <p>It takes account of the educational level normally expected as well as the equivalent level of knowledge gained without undertaking a formal course of study; and the practical experience required.</p>		
<p>Analytical and Judgement Skills</p> <p>Measures the analytical and judgement skills required to fulfil the job responsibilities satisfactorily.</p> <p>It takes account of requirements for analytical skills to diagnose a problem or illness and understand complex situations or information; and judgmental skills to formulate solutions and recommend/decide on the best course of action/treatment.</p>	<p>For example:</p> <p>Collects statistical information about the number of patients attending clinics, recording it onto a spreadsheet or the RIO computer system and obtaining reports on a monthly basis, on average.</p>	

<p>Planning and Organisational Skills</p> <p>Measures the planning and Organisational skills required to fulfil the job responsibilities satisfactorily. It also takes account of the complexity and degree of uncertainty involved in activities.</p>	<p>Takes account of the skills required for activities such as planning or organising clinical or non-clinical services, departments, rotas, meetings, conferences and for strategic planning. For example:</p> <p>Organises weekly case conferences on a variety of sites with clinicians, typing reports following the case conferences within specified timescales whilst ensuring confidentiality is maintained. Taking minutes at ad hoc management meetings, distributing them as appropriate.</p>	
<p>Physical Skills</p>	<p>Considers hand-eye co-ordination, sensory skills (sight, hearing, touch, taste, and smell) dexterity, manipulation, requirements for speed and accuracy, keyboard and driving skill.</p>	
<p>Responsibility for Patient/Client Care</p> <p>For clinical staff it is important to state the exact level of care provided.</p> <p>For example: A Health Care Assistant on a ward would provide personal care to patients, while a Primary nurse would develop programmes of care. Implementing programmes of care will include making minor modifications to the care plan within specified limits.</p>	<p>This would probably be missed on current administrative job descriptions. However, in the case of a medical secretary or ward clerk it may be appropriate to include:</p> <p>Advising patients on a daily basis about appointments etc.</p> <p>For a porter it could include moving patients from one ward to another. While other ancillary workers could include providing ancillary services direct to patients, such as drinks, housekeeping duties on wards.</p> <p>Words like specialist or highly specialist should not be used; instead, specific examples should be given in the job description which would indicate the nature of the duties. Examples could include providing advice to colleagues on safeguarding issues. It would be reasonable to expect the person specification to require additional training or qualifications if an individual is a specialist.</p>	

<p>Responsibility for Policy and Service Development.</p> <p>The level to which they develop and use policies.</p>	<p>Do they:</p> <ul style="list-style-type: none"> • follow policies, • have responsibility for implementing them, • develop them for their service area, Directorate, Trust or wider. <p>It is important that the level of responsibility is specified.</p>	
<p>Does the role have responsibility for finance or resources?</p> <p>Measures the responsibilities of the job holder for financial resources (including cash, vouchers, cheques, debits, and credits, invoice payment, budgets, revenues, income generation); and physical assets (including clinical, office, and other equipment; tools and instruments, vehicles, plant, and machinery; premises, fittings, and fixtures; personal possessions of patients/clients or others; goods, produce, stocks and supplies).</p>	<p>It is important to say what financial and other resources individuals are responsible for.</p> <p>Takes account of the nature of the responsibility (for example, careful use, security, maintenance, budgetary and ordering responsibilities); the frequency with which it is exercised; the value of the resources; and the degree to which the responsibility is shared with others.</p> <p>For example, are they:</p> <ul style="list-style-type: none"> • An authorised signatory, • Responsible for monitoring budgets, • Holding a delegated budget from a service, • A budget holder (accountable for the spending within a specified budget), • A multiple budget holder for several sites. • Alternatively, do they handle cash at least weekly, • Or have overall responsibility for the safe use of equipment used by others. 	
<p>Human Resources</p> <p>Will the role have line management responsibility or responsibility for people related matters?</p>	<p>Specify the level of responsibility the individual has for staff, including the training of others. For example:</p> <ul style="list-style-type: none"> • Do they supervise staff by allocating work on a day to day basis? • Provide on average weekly clinical/professional supervision, or training in own discipline? 	

<p>Includes responsibility for such personnel functions as recruitment, discipline, appraisal and career development; and the long-term development of human resources.</p> <p>The emphasis is on the nature of the responsibility, rather than the precise numbers of those supervised, coordinated or developed.</p> <p>It includes work planning and allocation; checking and evaluating work; undertaking clinical supervision; identifying training needs; developing and/or implementing training programmes; teaching staff, students, or trainees; and continuing professional development (CPD).</p>	<ul style="list-style-type: none"> • Are they responsible for undertaking NVQ assessments? • Do they manage a group of staff (including undertaking appraisals, first level of disciplinary and other action)? • Alternatively, is a major part of their job teaching or devising training? 	
<p>Responsibility for Information Resources.</p> <p>Measures the responsibilities of the job for information resources (for example, computerised; paper based; microfiche) and information systems (both hardware and software, for example, medical records).</p> <p>It takes account of the nature of the responsibility (security; processing and generating</p>	<p>For example, do they:</p> <ul style="list-style-type: none"> • Record personally generated information such as clinical observations, time sheets, etc. • Have responsibility for data entry and storage of data. • Have to create formal databases or spreadsheets using computer systems. It is essential that the frequency of this work is included. • Take and transcribe formal minutes such as board minutes, case conferences etc. It does not include taking notes at departmental meetings or processing notes taken by others. • Adapts information systems for others on an ongoing basis. Does not include one off adaptations to systems in the employees' area of 	

<p>information; creation, updating and maintenance of information databases or systems); and the degree to which it is shared with others. It assumes that all NHS information is confidential.</p>	<p>work.</p> <ul style="list-style-type: none"> • Design and develop significant systems for others. • Manage and Develop systems at a Departmental level as a major part of their job. • Have corporate responsibility for the provision of information systems for the organisation. 	
<p>Responsibility for research and development</p> <p>Measures the responsibilities of the job for informal and formal clinical or non-clinical research and development activities underpinned by appropriate methodology and documentation, including formal testing or evaluation of drugs, or clinical or non-clinical equipment.</p>	<p>It is important that the job description specifies exactly what level if any of research and development the individual undertakes. For example:</p> <ul style="list-style-type: none"> • How often do they undertake research and development activities, including testing drugs or equipment, formal non-clinical research (human resources, communications, health education) or formal clinical research? • Do they undertake surveys or audits? • Research and Development is at least 20% of the job. • Do they control, co-ordinate and implement Research and Development programmes or activity as a requirement of the job? <p>Is a substantial part of the job initiating and developing research and development programmes which can include securing of funding and supports the objectives of the organisation or wider health service. It is important to specify the level involved.</p>	

<p>Freedom to Act.</p> <p>Measures the extent to which the job holder is required to be accountable for their own actions and those of others, to use their own initiative and act independently; and the discretion allowed to the job holder to take action.</p> <p>It takes account of any restrictions on the job holder's freedom to act imposed by, for example, supervisory control; instructions, procedures, practices, and policies; professional, technical, or occupational codes of practice or other ethical guidelines; the nature or system in which the job operates; the position of the job within the organisation; and the existence of any statutory responsibility for service provision.</p>	<ul style="list-style-type: none"> • Are they guided by standard operating procedures, good practice, established precedents etc., but can seek advice on non-routine matters? • Work may be checked randomly or on a sample basis. • Are they guided by codes of conduct, precedent and clearly defined occupational policies? • Work being managed rather than supervised. This will apply to qualified professional staff. • Are they guided by principles, broad occupational policies, and legislation? • This will include departmental managers, and clinical practitioners who specialise in a particular field. • Are they guided by general health, organisational or broad occupational policies but provide advice to the organisation on how they should be interpreted? Normally only one job in any service could be assessed at this level. <p>Are they required to interpret overall health service policy and strategy, setting goals and standards for others?</p>	
<p>Physical Effort</p> <p>Measures the nature, level, frequency, and duration of the physical effort (sustained effort at a similar level or sudden explosive effort) required for the job.</p>	<p>Physical Effort:</p> <p>Takes account of any circumstances that may affect the degree of effort required, such as working in an awkward position or confined space.</p>	

<p>Mental Effort Measures the nature, level, frequency, and duration of the mental effort required for the job (for example concentration, responding to unpredictable work patterns, interruptions, and the need to meet deadlines).</p> <p>Emotional Effort Measures the nature, level, frequency, and duration demands of the emotional effort required to undertake clinical or non-clinical duties that are generally considered to be distressing and/or demanding.</p>	<p>Mental Effort: The amount of concentration that is required by an individual to undertake the role should be</p> <p>For example, if an individual is required to draft long reports. An assessment of the amount of time spent answering telephone enquires or dealing with other queries would be beneficial.</p> <p>Emotional Effort: Again, it should be possible to assess the amount of emotional effort required to undertake the job. It is important that the frequency of undertaking tasks is assessed. For example, an individual who is caring for the terminally ill may deal with distressing situations more frequently than an individual who works with orthopaedic patients.</p> <p>Make sure the type of client group provided e.g. responsible for drafting care plans for patients with terminal or other illnesses, on a daily basis, providing emotional support to them and relatives as appropriate.</p>	
<p>Working Conditions</p> <p>Measures the nature, level, frequency, and duration of demands arising from inevitably adverse environmental conditions</p>	<p>Such as inclement weather, extreme heat/cold, smells, noise, and fumes and hazards, which are unavoidable (even with the strictest health and safety controls), such as road traffic accidents, spills of harmful chemicals, aggressive behaviour of patients, clients, relatives, carers.</p>	

	Does the job entail sitting or standing in a restricted position for a substantial period of the working day (at a keyboard, driving, using a telephone headset, standing at a machine in a restricted area, standing while serving meals or making sandwiches)?	
Working Conditions Continued	DOES THE INDIVIDUAL MOVE OBJECTS (includes pushing pulling objects between 6 and 1 kilos, moving patients with mechanical aids over 15 kilos, manoeuvring patients for treatment or personal care purposes, running from a standing start)? HOW OFTEN (Each shift, more frequently, less frequently, never)	
	DOES THE INDIVIDUAL MOVE OBJECTS (pushing, pulling, lifting objects over 15 kilos without mechanical aids, lifting heavy containers, heavy manual digging, heavy duty pot washing, running from a standing start pushing a trolley)? HOW OFTEN (more than once a shift, weekly, monthly, less often.) ON AVERAGE WHAT PERIOD OF TIME DOES EACH LIFT TAKE (5 minutes, 10 minutes, 20 minutes, longer than this)	
	HOW OFTEN DOES THE INDIVIDUAL COME INTO CONTACT WITH dirt, dust, smells, noise, inclement weather, and extreme temperatures (several times a week, three times a month, less frequently than this, never)	
	HOW OFTEN DOES THE INDIVIDUAL HAVE TO DEAL WITH body fluids, foul linen, fleas, lice, noxious fumes (several times a week, three times a month, less frequently than this, never)	
	DOES THE INDIVIDUAL COME INTO CONTACT WITH face to face physical aggression, spills of harmful chemicals, and road traffic accidents at work? Is this on a ward, in the community, on Trust premises?	
	HOW OFTEN IF THE INDIVIDUAL REQUIRED TO DRIVE FOR WORK (daily, weekly, several times a week) not home to work or return.	
	HOW OFTEN IS THE INDIVIDUAL REQUIRED TO USE A COMPUTER AT WORK (several hours a day, less frequently)	
	HOW OFTEN IS THE INDIVIDUAL REQUIRED TO WORK OUTDOORS (weekly, several times a week, less frequently, never)	

OTHER SIGNIFICANT INFORMATION RELEVANT TO THIS POST:		
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Job Description

**** this template will cover the requirements of the majority of administrative roles. There is a separate template format designed for clinical roles which covers the additional factors related to undertaking a professional clinical role within Solent NHS Trust**.**

Position Details		
Title:	Band:	Hours per week
Accountable to:	Service:	
Purpose of the Position		
Summary (no more than 2 paragraphs) here		
Service Description:		
Please note that this section is to be added by the service and must be approved by the relevant manager.		
Please also ensure that the following information is recorded in this section:		
<ul style="list-style-type: none"> • Identified patient/client group for the role • Area of speciality/ clinical practice and setting that role will primarily be delivered in. • Key points of integration and collaboration with other teams; services or providers • The anticipated outcomes of the role/intervention 		
Main duties		
<ul style="list-style-type: none"> ▪ Administrative ▪ ICT ▪ Role duties ▪ Team duties ▪ Customer/patient/service user//other stakeholder duties 		
Management and Leadership (where appropriate)		
Limits of Authority		
<ul style="list-style-type: none"> • May/may not suspend staff under the disciplinary procedures. • May/may not dismiss staff under the disciplinary procedures. • May not take annual leave without prior agreement of the manager 		
General Requirements		
<ul style="list-style-type: none"> • Ensure they and where appropriate their staff: <ul style="list-style-type: none"> ○ adhere to trust policies and procedures at all times, ○ comply with trust standing orders, standing financial instructions, policies, procedures, and guidelines, ○ follow any policies and procedures in relation to infection, prevention, and control. 		

- are aware of their responsibilities in relation to safeguarding children, and vulnerable adults, and the specific responsibilities placed on individuals who care for such clients/patients
 - take all reasonable steps to manage and promote a safe and healthy working environment which is free from discrimination,
 - comply with the trust policy on confidentiality, and the Data Protection Act 1998 as amended, relating to information held manually or on computerised systems,
 - respect the confidentiality and privacy of clients and staff at all times,
 - maintain a constant awareness of health, welfare and safety issues affecting colleagues, patients, visitors, and themselves, reporting any accidents or fault in line with trust policy,
 - fully participate in health and safety training,
 - participate in personal training, development, appraisal, and attend all relevant training courses as required.
 - comply with the professional body code of conduct
- This job description seeks to outline the key duties and responsibilities of the post; it is not a definitive document and does not form part of the main statement of Terms and Conditions. The job description will be reviewed during the annual appraisal process.
 - The post holder may, with their agreement, which should not reasonably be withheld, be required to undertake other duties as required, which fall within the grading of this post, to meet the needs of this new and developing service.
 - Individuals who are required to hold a professional registration in order to practice must continue to be a member of their professional body throughout the lifespan of this job description. Such individuals will be required to notify the Trust immediately if their professional body limits or changes the terms of their registration.
 - This job description will be reviewed yearly as part of the annual individual appraisal, to ensure that it reflects the responsibilities of the post. No changes will be made without full consultation with the post holder.

PERSON SPECIFICATION

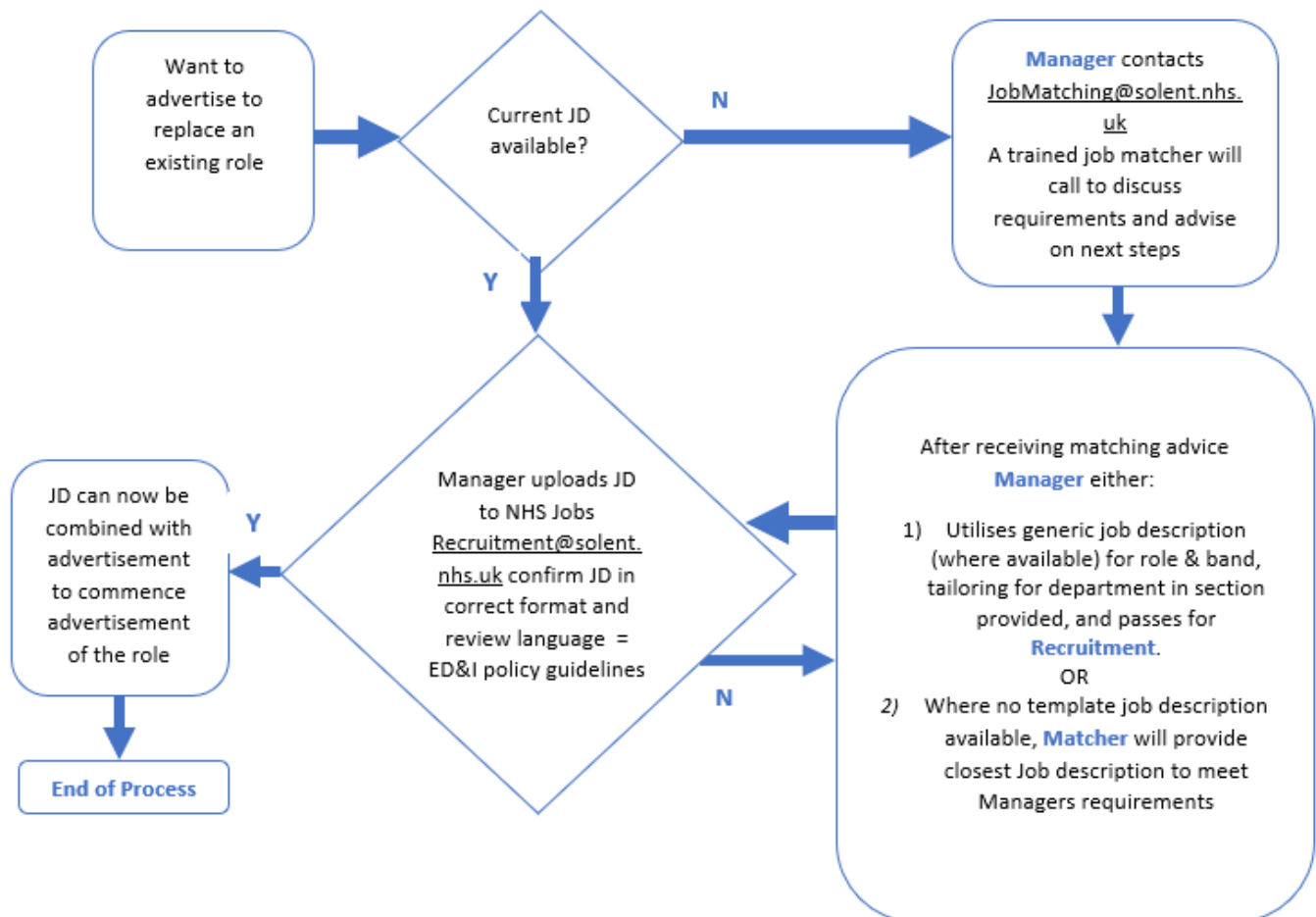
Post:

Requirement <i>Where a specific requirement is identified, Solent NHS Trust will consider relevant skills and experience obtained via an alternative route (where the identified standard can be met) and/or where the standard can be met with reasonable adjustments i.e., appropriate access, equipment and/or software.</i>	Essential	Desirable	Met
Criteria 1: Qualifications			
	x		
	x		
	x		
	x		
	x		
Criteria 2: Experience			
	x		
	x		
	x		
	x		
	x		
	x		
	x		
Criteria 3: Skills			
	x		
	x		
	x		
	x		
	x		
	x		
	x		
	x		
	x		
	x		
	x		
	x		
Criteria 4: Knowledge			
	x		
	x		
	x		
	x		
	x		
	x		

Requirement	Essential	Desirable	Met
<i>Where a specific requirement is identified, Solent NHS Trust will consider relevant skills and experience obtained via an alternative route (where the identified standard can be met) and/or where the standard can be met with reasonable adjustments i.e., appropriate access, equipment and/or software.</i>			
	x		
	x		
	x		
	x		
	x		
Criteria 5: Equality			
Be able to demonstrate and understanding of the principles of equality, diversity, and inclusion and how they apply to staff and patients in a healthcare setting. Able to demonstrate personal commitment to challenging discrimination and promoting equalities, at an appropriate level for the post.	x		
Criteria 6: Other			
Is able to work legally in the UK	x		
Is able to work with children and vulnerable adults	x		
Ability to travel daily for meetings across a range of sites in Southampton/Portsmouth/Hampshire.	x		
For posts which require a professional registration, postholders hold a valid up to date registration with their professional body.	x		
For posts where postholders are required to drive as part of their role they hold a valid full driving licence which enables them to legally drive in the UK	x		

Job Matching Process (February 2021)

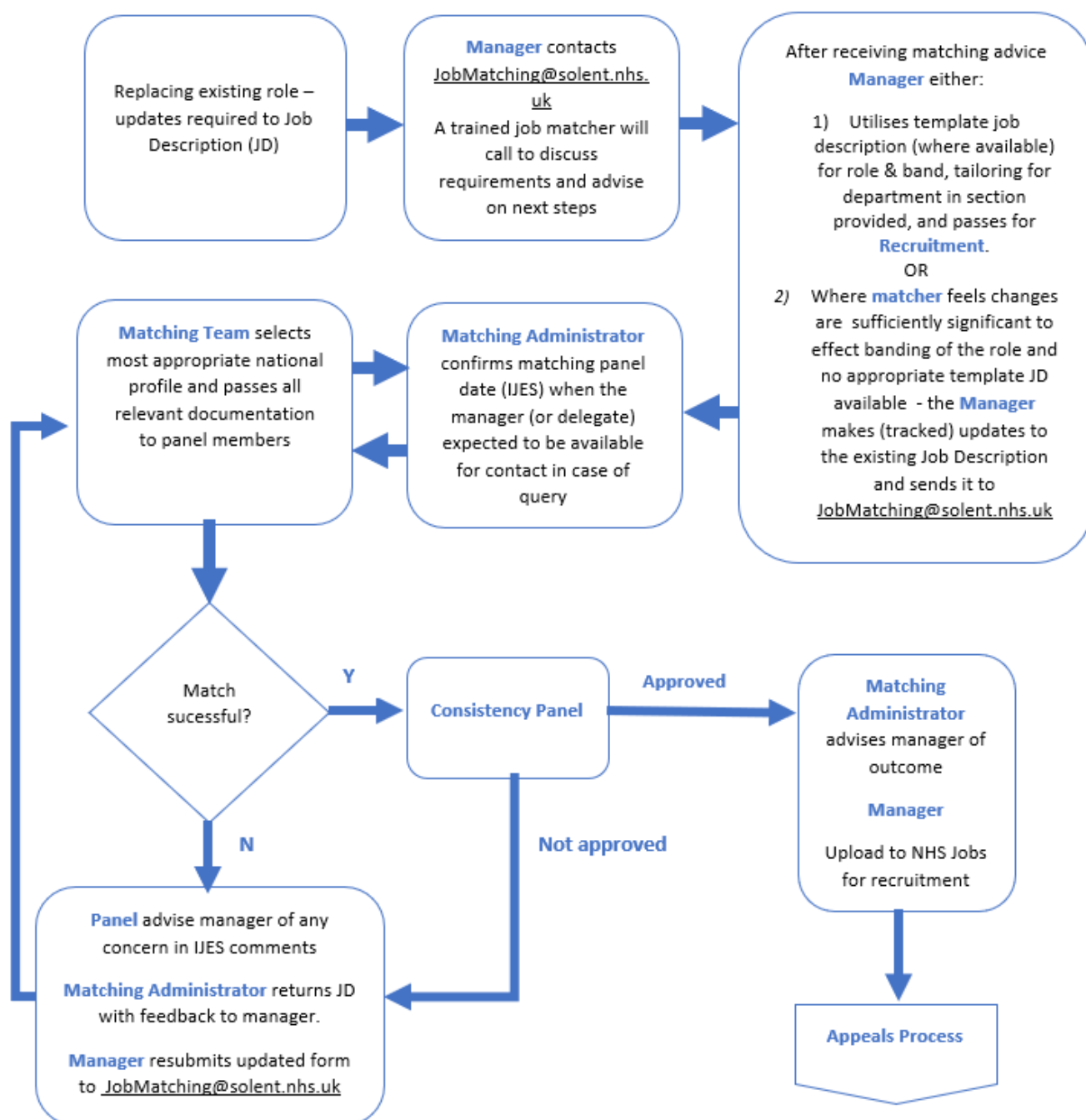
Advertise to Replace an Existing Role (No changes required)



ii) Manager wants to make updates to an Existing Role

Job Matching Process (February 2021)

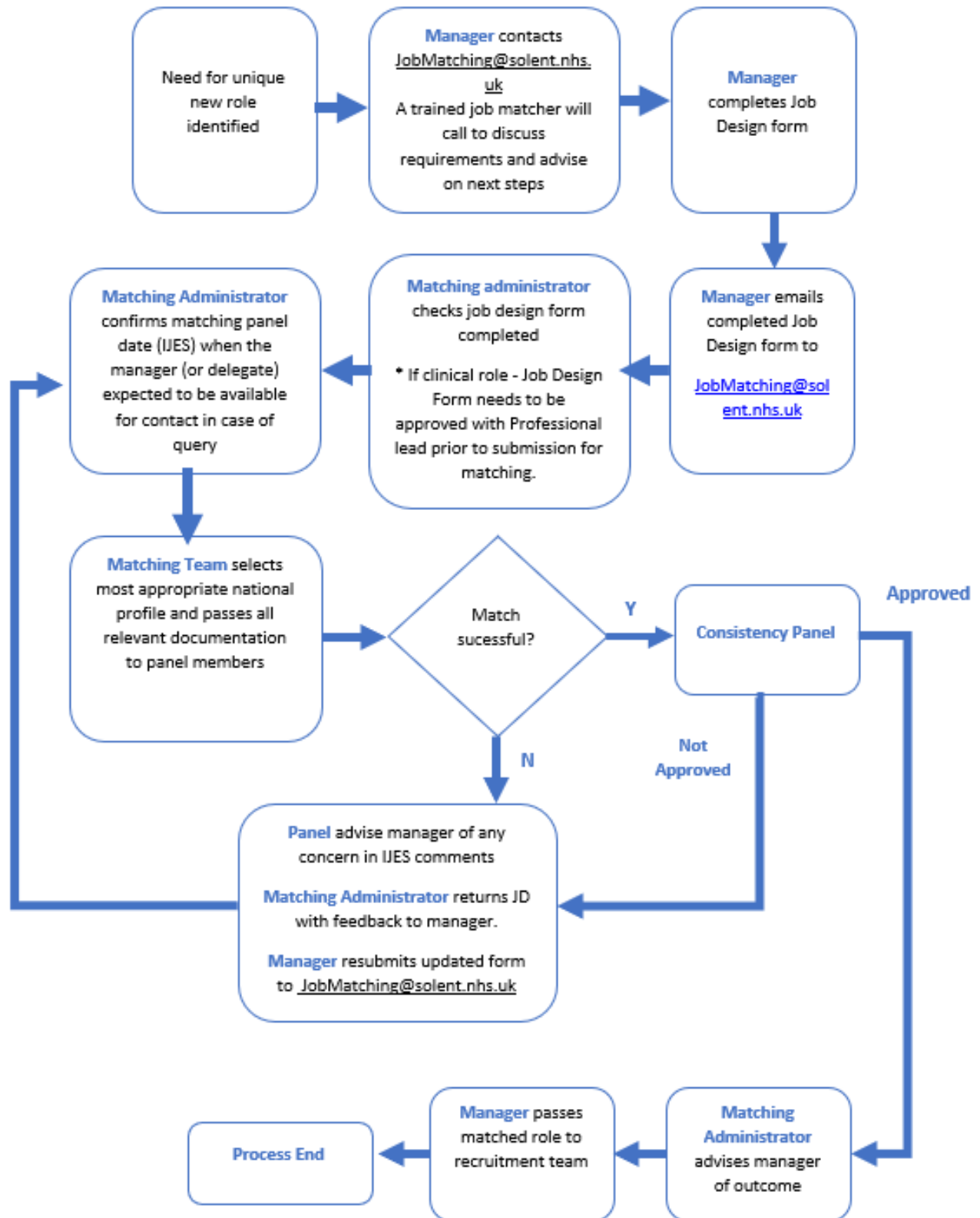
Manager wants to make updates to an Existing Role



iii) Unique Role

Job Matching Process (February 2021)

Unique Role



Appendix D – Appeal Against Evaluation/Matching outcome

1. In the event that groups of staff or individuals are dissatisfied with the result of matching or evaluating they may request a review. This review should be conducted by a new panel with the majority of its members different from the original panel.
2. The request must be made within three months of notification of the original panel's decision. In order to trigger a review, the jobholder(s) must provide details in writing of where they disagree with the match or evaluation and evidence to support their case (please refer to template below).
3. If requested by an employee, the employee's own staff side organisation representative and/or the line manager can be present.
4. Where a formal review is necessary, the review panel operates in the same way as the original one and follows the procedure for matching, including having available/contactable job advisers or representatives.
5. The review panel can:
 - confirm the same match / evaluation outcome.
 - confirm a match to a different profile or make a different evaluation,
 - or in the case of matching reviews only, refer the job for local evaluation.
6. Since the NHS JE Scheme places paramount importance on the issue of accurate and up-to-date information, the review panel must only consider the facts before them.
7. The jobholder will have provided evidence relating to the factor levels they disagree with. However, if the panel wishes to revisit other factors, they need to provide justification for doing this for example because the new evidence provided is thought to alter other scores. They will then need to refer to the evidence they have been presented with, submit supplementary questions to the job advisors or representatives (two people representing management and staff in the area of work under review) where necessary and allow the jobholder to provide additional information.
8. Panels should only complete the review once they are satisfied that all relevant evidence has been examined.
9. All panel members will have been trained on the importance of matching or evaluating jobs using accurate information rather than making assumptions which are not evidenced. It is important that this process should equally apply to the review procedure; the risk in making assumptions about somebody's job could lead to pay inequality and the scheme being brought into disrepute.
10. The review panel's decision, whether it changes the banding outcome or not, must be subject to quality and consistency checking.
11. The jobholder has no right of appeal beyond the review panel if their complaint is about the banding outcome.

12. It is important that good records are kept of the review outcomes and any amendments made to the original match or evaluation to provide an audit trail for the future.
13. The jobholder should be provided with a detailed job report of the review of the match or evaluation.

Equality Analysis and Equality Impact Assessment

Equality Analysis is a way of considering the potential impact on different groups protected from discrimination by the Equality Act 2010. It is a legal requirement that places a duty on public sector organisations (The Public Sector Equality Duty) to integrate consideration of Equality, Diversity, and Inclusion into their day-to-day business. The Equality Duty has 3 aims, it requires public bodies to have due regard to the need to:

- **eliminate unlawful discrimination**, harassment, victimisation, and other conduct prohibited by the Equality Act of 2010.
- **advance equality of opportunity** between people who share a protected characteristic and people who do not;
- **foster good relations** between people who share a protected characteristic and people who do not.

Equality Impact Assessment (EIA) is a tool for examining the main functions and policies of an organisation to see whether they have the potential to affect people differently. Their purpose is to identify and address existing or potential inequalities, resulting from policy and practice development. Ideally, EIAs should cover all the strands of diversity and Inclusion. It will help us better understand its functions and the way decisions are made by:

- **considering the current situation**
- **deciding the aims and intended outcomes of a function or policy.**
- **considering what evidence there is to support the decision and identifying any gaps.**
- **ensuring it is an informed decision.**

Equality Impact Assessment (EIA)

Step 1: Scoping and Identifying the Aims

Service Line / Department	People & Organisational Development	
Title of Change:	Updated Job evaluation & matching procedure	
What are you completing this EIA for? (Please select):	Policy	<i>(If other please specify here)</i>
What are the main aims / objectives of the changes	To update the procedure to reflect updated practices which intend to improve the efficiency and effectiveness of Job evaluation and matching, ensure Solent remain true to their principles of equal pay and reduce recruitment lead times.	

Step 2: Assessing the Impact

Please use the drop-down feature to detail any positive or negative impacts of this document /policy on patients in the drop-down box below. If there is no impact, please select "not applicable":

Protected Characteristic	Positive Impact(s)	Negative Impact(s)	Not applicable	Action to address negative impact: (e.g., adjustment to the policy)
Sex	Yes			The procedure itself focuses on the job rather than the individual and the identity of the individual is not taken into account by the job evaluation and matching procedure. Proper use of job evaluation and matching processes and consistency checking will support Solent's commitment to equal pay and reduce the risk of Gender Pay inequality.
Gender reassignment	Yes			Proper use of job evaluation and matching processes and consistency checking will support Solent's commitment to equal pay and reduce the risk of Gender Pay inequality.
Disability	Yes			Proper use of job evaluation and matching processes and consistency checking will support Solent's commitment to equal pay and reduce the risk of potential pay inequality. Policy emphasises reasonable adjustments in section 3.3.4.
Age	Yes			Proper use of job evaluation and matching processes and consistency checking will support Solent's commitment to equal pay and reduce the risk of potential pay inequality.
Sexual Orientation	Yes			Proper use of job evaluation and matching processes and consistency checking will support Solent's commitment to equal pay and reduce the risk of potential pay inequality.
Pregnancy and maternity	Yes			Proper use of job evaluation and matching processes and consistency checking will support Solent's commitment to equal pay and reduce the risk of potential pay inequality.
Marriage and civil partnership	Yes			Proper use of job evaluation and matching processes and consistency checking will support Solent's commitment to equal pay and reduce the risk of potential pay inequality.
Religion or belief	Yes			Proper use of job evaluation and matching processes and consistency checking will support Solent's commitment to equal pay and reduce the risk of potential pay inequality.
Race	Yes			Proper use of job evaluation and matching processes and consistency checking will support Solent's commitment to equal pay and reduce the risk of potential pay inequality.

If you answer yes to any of the following, you MUST complete the evidence column explaining what information you have considered which has led you to reach this decision.

Assessment Questions	Yes / No	Please document evidence / any mitigations
In consideration of your document development, did you consult with others, for example, external	Yes	JCNC and specifically Chair, Nursing and Unison leads were consulted and engaged with the development of the updated procedure. We also engaged with Associate Nursing Director (who has oversight of

organisations, service users, carers, or other voluntary sector groups?)		professional standards for Nursing and Allied Health Professionals.
Have you taken into consideration any regulations, professional standards?	Yes	Yes, Agenda for Change Terms and conditions and the NHS Job Evaluation Handbook (2020) which applies to all professions employed under Agenda for Change (National) Terms and Conditions.

Step 3: Review, Risk and Action Plans

How would you rate the overall level of impact / risk to the organisation if no action taken?	Low <input type="checkbox"/>	Medium <input checked="" type="checkbox"/>	High <input type="checkbox"/>
What action needs to be taken to reduce or eliminate the negative impact?	One of the reasons for reviewing the job evaluation and matching process was because it was believed that there was a risk of roles being developed around specific individuals rather than the needs of the organisation and the specific job. The risk of this circumstance arising is reduced by the implementation of the updated procedure.		
Who will be responsible for monitoring and regular review of the document / policy?	Head of People Operations. Joint Consultative & Negotiating Committee (JCNC).		

Step 4: Authorisation and sign off

I am satisfied that all available evidence has been accurately assessed for any potential impact on patients and groups with protected characteristics in the scope of this project / change / policy / procedure / practice / activity. Mitigation, where appropriate has been identified and dealt with accordingly.

Equality Assessor:	Joanna Brooks	Date:	18/02/2021
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