

Job Matching/Evaluation Procedure

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VERSION NUMBER	2
KEY CHANGES FROM PREVIOUS VERSION	3 year review: Amended job titles; expanded s2.2; reworded 'Re-evaluation of existing posts'; added s2.6; added Matching & Clustering section; renamed s3 and removed sub-sections; renamed s4; added s4.7; amended wording in Appendices 2 & 3; rescinded Appendix 5
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PROCEDURE SUMMARY
This document sets out the Trust's fair and equitable approach to the management of Job Evaluation procedures in line with national guidance and partnership working.
The Trust monitors the implementation of and compliance with this procedure in the following ways:

The Executive Director responsible for the review and implementation of this Policy is the Executive Director of People & Culture

ESSEX PARTNERSHIP UNIVERSITY NHS FOUNDATION TRUST

JOB MATCHING/EVALUATION PROCEDURE

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ESSEX PARTNERSHIP UNIVERSITY NHS FOUNDATION TRUST

JOB MATCHING/EVALUATION PROCEDURE

1.0 ASSURANCE STATEMENT

- 1.1 This procedure supports Essex Partnership University NHS Foundation Trust's ('the Trust') Job Evaluation Policy and sets out a fair and equitable method of determining pay bands for roles within the Trust.

2.0 INTRODUCTION

- 2.1 This procedure is applicable to all new posts arising out of service re-design / new service structures and through organisational change plus an existing post(s) where an employee and their manager believe there have been material changes to the duties required for the role.

Matching/Evaluation of new posts

- 2.2 All new posts created by the Trust will be matched or evaluated and placed within an appropriate pay band in accordance with the latest edition of the NHS Job Evaluation Handbook. The job descriptions and person specification for all new posts should be submitted by the line manager to panel for evaluation along with a completed Additional Questions Sheet – Appendix 1. If any of the above is not included the post will not be sent to panel.

The evaluation of new posts will be carried out by experienced evaluations panel members in partnership, who will be advised by appropriate management and staff side representative. It must be acknowledged that some questions may be unanswerable at this stage as there is no one working in the post.

After recruitment, a reasonable period of time should be allowed for the job to 'bed down' and this may vary according to the nature of the job and may be up to a few months. When the demands of the post are clear, the post holder and/or the manager should review the job description and if there are changes to be made, the job evaluation outcome must be reassess using the matching or evaluation procedure as appropriate.

Re-evaluation of existing posts

- 2.3 Where an employee and their manager agree that the demands of the employee's post have changed then a review of the post needs to be carried out. This document details the agreed local process for carrying out a re-evaluation.
- 2.4 This procedure will apply to an employee or group of employees. If applied to a group of employees there will be a nominated representative, herein referred to as 'an employee'.

- 2.5 Where there is more than one employee sharing a job role, all employees affected by those role changes must agree to the review being processed. The outcome of the job evaluation review will apply to all employees holding that job description.
- 2.6 The Trust needs to establish how changes to posts will be identified and verified. In some cases it may be obvious and there will be discussion around these changing roles. On other occasions it may be due to demographic, incidental or re-organisational changes.
- 2.7 The NHS Job Evaluation Scheme and this procedure can only review a job description and person specification. It does not review individual competence of an employee.
- 2.8 The job matching/evaluation process does not reward volume of activity. It recognises a significant change to level of responsibility / accountability and skills / knowledge required for the role as measured in the 16 factors and the Job Evaluation Scheme.
- 2.9 The process could take up to 3 months. If a change to a pay band is determined this will be backdated to the date completed papers are received and acknowledged by Human Resources.

Matching and Clustering of posts

- 2.10 Matching should be carried out by a panel comprising of both management and staff representatives and panel members will be trained in the NHS JE Scheme. The matching process is based primarily on agreed and current job descriptions and person specifications.
- 2.11 The matching panel will identify possible profile matches using the profile index and profile titles and these will usually come from the same occupational grouping. The profile job statement will then be compared with the job profile and any other information available.
- 2.12 All job evaluation outcomes will be subject to consistency checking which will be undertaken by experienced JE practitioners. Once this is complete the matching form and a letter explaining the proposed pay banding and appeal process will be issued to the job holder(s)

3.0 RE-EVALUATION PROCEDURE

- 3.1 Where a request for a re-evaluation of an existing role has been made the employee must agree with their manager an amended / revised job description and person specification showing how the job has changed. If the manager does not agree with the changes a re-evaluation cannot be submitted, if the employee does not agree with the manager's decision they may submit a grievance in line with Point 5.1. Appendix 2 should be completed and signed by the Manager and the Employee and a copy of the revised job description and person specification, indicating the tracked changes, along with any additional information you wish to submit on this

Appendix, together with the Additional Questions Sheet – Appendix 1, should be supplied for evaluation.

- 3.2 The job description and person specification will be matched/evaluated, as applicable by a properly constituted panel or the employee may be requested to complete a Job Analysis Questionnaire (JAQ) to proceed to job evaluation, i.e. if a national profile is not available or if it is not possible to match the employee's post against such a profile.
- 3.3 All posts that have been through the re-evaluation process will be checked for consistency by the Job Evaluation Leads. The manager will then be notified via email of the outcome including details of the national profile the post has been matched against. A copy of the matched job report can be provided upon request. It is the Manager's responsibility to ensure the funding is in place for any changes to the post, as a result of this process and to complete a Staff Change Form. If there is a disagreement with the outcome of the re-evaluation process a review/appeal can be requested by following Section 4.0 below.

4.0 REVIEW/APEAL PROCEDURE

- 4.1 If an employee or groups of staff are dissatisfied with the outcome of the evaluation, they must write to the Job Evaluation lead within three months of notification with the reason(s) for their request for review and enclosed completed forms Appendices 3 and 4. The appeal will be considered by a as outlined in 4.5 below.
- 4.2 The review procedure follows the principles outlined in the NHS Job Evaluation Handbook (latest version). A flowchart of the process is included at Appendix 4.
- 4.3 This is an internal procedure and there is no right of further appeal beyond the final stage described here.
- 4.4 An appeal application must be returned within 3 months of the written notification of the matching / evaluation outcome and must be signed by the employee's manager.
- 4.5 Receipt of the appeal form will be acknowledged.
- 4.6 The information contained on the appeal application will be considered by a panel of experienced job evaluators (which will comprise of different members than the first panel), in accordance with the principles of the NHS Job Evaluation Handbook (latest edition).
- 4.7 Where posts were originally matched, a review matching panel (consisting of different members from the initial panel) will consider the review information. The review panel will either:
 - Match the post to the same profile

- Confirm a match to a different profile which may be of a higher, lower or the same band, or
- Exceptionally refer the job for local evaluation in which case the employee will be asked to complete a JAQ.

4.8 The employee has no right of further appeal beyond this stage if their complaint is regarding the matching, evaluation or review outcome.

5.0 GRIEVANCES ABOUT THE PROCESS

5.1 If an employee believes that the procedure used to match/evaluate their post was implemented incorrectly they may pursue a grievance. This will need to be within 3 months of receipt of formal notification of the review panel's final decision. The grievance will be dealt with by management as set out in the Trust's Grievance Policy and Procedure. The purpose of any grievance hearing will determine:

- The nature of the procedural error
- To ascertain whether it would have affected the outcome
- Based on the considerations above, to determine a commensurate remedy.

6.0 REFERENCES TO OTHER TRUST POLICIES / PROCEDURES

- Grievance Policy
- Recruitment and Retention Procedure

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