

## AGENDA FOR CHANGE: JOB EVALUATION

**NEW or CHANGED JOBS PROCESS**

**THIS DOCUMENT IS FOR GUIDANCE AND REFERENCE SHOULD ALSO BE MADE TO THE JOB EVALUATION HANDBOOK AND THE NHS SCOTLAND AGENDA FOR CHANGE JOB EVALUATION POLICY.**

1. **Background**

There is a need for the NHS Job Evaluation Scheme to continue to be used for determining the banding of posts and consequently staff pay rates. This will apply to all new posts and posts which have significantly changed since they were last evaluated.

Job evaluation as a tool of Agenda for Change does not of itself achieve service improvement, but the process may assist in the identification and development of new roles and is necessary to ensure that new posts are slotted into the organisational structure at the correct level.

There will be a need to consider whether to replace vacant posts with a similar post or to evaluate the needs of the service and create a new role in line with service improvement. In some cases, vacant posts may be replaced on a ‘like for like’ basis. However, as a result of service or organisational change, there may be a requirement to alter the content of jobs or to deploy staff resources in different ways. Such changes should be in line with the Board’s Managing Workforce Change Policy.

## New Jobs

Submissions should be made using the template form (Appendix 1) and include the following:

The new job description completed using the NHSGG&C standard template and the proposed national profile. If the new post is part of a wider service change, involving more than one post then all job descriptions established should be submitted (see Appendix 1).

All new jobs require to be authorised by the Director/Head of Service and submitted for evaluation via the Head of Human Resources.

Where a new job has been created, evaluated and band outcome determined, there will be a period of time, normally 6 months to 1 year when the job description should be revisited to ensure the content is an accurate reflection of the job. If the duties being carried out no longer reflect the job content then, where there are significant changes between the original job description and the role being carried out by the postholder, this should be addressed through the New and Changed Job process. It should be noted that this should be carried out timeously.

## Changed Jobs

Posts can change over a period of time but for most the job evaluation outcome will not normally be affected unless there are significant changes.

Where a post holder and the manager agree that the demands of the post have/will significantly change then a re-evaluation of the post may require to be carried out.

Where a job has significantly changed there should be a re-match or re-evaluation and the whole job should be assessed, albeit with reference back to the original match or evaluation. Just dealing with some factors in these circumstances could lead to inconsistencies.

When a job has changed significantly, the revised job description should be submitted using the template form (Appendix 1). The submission should include all of the following:

1. The original job description used in the job matching/evaluation process.
2. A copy of the matched job or evaluation report relating to the original job description and grading outcome
3. Revised job description, clearly showing additions and revisions
4. A full organizational chart showing the post to be graded
5. A note of any similar posts in the organization that may be comparators.

## 4. NHS SCOTLAND: AGENDA FOR CHANGE JOB DESCRIPTION SHARING PROTOCOL (PCS(AFC)2023/3)

Where the job description sharing protocol is applied, all requests will be made by the Head of Human Resources and submitted to the Job Evaluation Lead for action.

Where job descriptions developed by another NHS Scotland organisation are shared, the final version of the job description to be used within NHS GG&C will require to be assessed by job evaluation practitioners in Partnership to determine:

1. Whether the role will be submitted to be evaluated by a matching panel or
2. Can progress to be consistency checked.

For new jobs, the ‘bedding-in’ process described in section 2 will be applied.

## 5. Reviews

Following the band outcome of a changed job, the postholder may wish to request a review of the outcome. The postholder will discuss the request for a review with their line manager and the line manager requires to support the employees request for a review in terms of agreeing the content of the review submission is a true, fair and accurate reflection of the job demands. No new information contrary to the submitted job description will be accepted as part of the review submission. All review documentation requires to be submitted to the relevant Head of Human Resources for submission within the 3 months of the notified Matching outcome. The Review Submission form is attached in Appendix 2.

The Review Panel should comprise of a minimum of four trained and experienced job matchers. Two from management and two from staffside.

A Review Panel will consider whether there is a case for a review. If no then the review will not be progressed and the panel will document their rationale. If yes then the panel will assess the submission. The Panel require to consider whether the change would affect the band outcome and advise as appropriate. There will be no right of appeal and no right to submit a grievance based on the outcome.

## Administration

A pool of approved and competently trained management and staffside matchers/ evaluators will be maintained. Refresher training will be provided where the need or demand is identified. New matchers/evaluators will be trained to ensure there are sufficient matchers/evaluators to meet the needs and demands of the organisation.

Job matching panels will be held regularly to meet the needs of the organisation. All panels must consist of two management and two Staff Side representatives trained in the application of the NHS Job Evaluation Scheme.

There are 3 possible outcomes from matching panels: Profile Match; Band Match; and No Match. These are described below:

1. If all factor levels are within the range specified on the profile, this is a (perfect) Profile Match.
2. If most factor levels match, but there are a small number of variations, there may still be a Band Match, *if all the following conditions apply*:
	* The variations are of not more than one level above or below profile level or range and
* The variations do not relate to the knowledge or freedom to act factors. Variations in these factors are indicative of a different profile and/or band and
* The variations do not apply to more than five factors. Multiple variations are indicative of a different profile or the need for a local evaluation and
* The score variations do not take the job over a grade boundary.

c) If there are any No match indicators in the Match column shown on the TurasJE system, there is No Match. The panel will record this and repeat the process with another identified profile. If there is no other possible profile, the job will be referred for local evaluation following the steps outlined in Section 12 of the NHS Job Evaluation Scheme handbook.

d) Where a panel request additional information, this must be requested in writing and recorded on the TurasJE system.

 Following receipt of the additional information, the original panel will normally be reconvened. Where this is not reasonably practicable, a panel can be convened to continue the evaluation process where at least two original panel members are included in the panel.

In line with the Job Evaluation Handbook, consistency checking panels will work in co-operation with the original evaluation panel to ensure that job matching and evaluation outcomes are consistent with the application of the NHS Job Evaluation Scheme.

## Quality Assurance

In line with the above a consistency checking panel will also be scheduled following on from the matching Panel.

Any apparent issues or inconsistencies in matching must be referred back to the original matching panel with any queries and/or comments.

Where this is not reasonably practicable, a panel can be convened to continue the evaluation process where at least two original panel members are included in the panel.

The matching panel must review the match in question and answer any queries or make amendments to the original match, as appropriate. This will then be returned to a consistency checking panel for conclusion.

The outcomes should be checked for consistency against:

* + Other matches completed by the same and other matching panels over an agreed period.
	+ Other local matches within the same occupational group and job family.
* Other local matches within the same pay band.
* National profiles for the same occupational group and pay band.

## Notification process

When job matching and evaluation outcomes are finalised the Job Evaluation Unit will notify the outcome to the appropriate Head of HR.

The notification will confirm the pay band, TurasJE reference (job code) and a copy of the Job Matched Report for reference.

* The Head of HR will then be responsible for communicating this to the manager.
* The Manager will formally notify the employee of the grading outcome in writing.
* The Manager will also be responsible for notifying Payroll and updating information on EESS and/or other workforce systems, where this is required.

## Appendix 1

 **Appendix 1**

**AGENDA FOR CHANGE JOB EVALUATION SUBMISSION FORM**

**This form must be used to submit posts for grading using the Agenda for Change (AfC)**

**Job Evaluation Scheme. The Service/Department must retain:**

* **A copy of the submission that lists the authorizing Manager / Head of Service /**

**Director.**

* **A copy of the agreed job description(s) and all other job related evidence that is**

**part of the submission must also be retained for reference by the Service /**

**Department.**

**SECTION 1: AUTHORIZATION**

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| When authorizing this submission Managers, Heads of Service and Directors are confirming that they:1. Have read the submission content and understand and accept their responsibilities to ensure all information is accurate and reflects the requirements of the role as it is performed by the postholder(s).
2. Agree with all the information submitted for consideration.
3. Confirm that the job description has been agreed with the employee(s) and reflects the role to be carried out.
4. Confirm there has been discussion and agreement with staffside representatives as part of the process.
5. Have checked the submission to ensure that the job information provided, especially that related to qualifications, skills or experience reflects only that which is required for the post now or for recruitment.
6. Have checked that individual postholders’ qualifications, skills or experience that are not required for the post has not been included.
 |
| **Authorizing Manager / Head of Service / Director****(name in block capitals)** |  |
| **Signed...................................................................** | **Date......................** |
| **Head of Human Resources (name in block capitals)** |  |
| **Signed...................................................................** | **Date......................** |
| **For Changed Jobs only:** **Date when the postholder and manager agreed the job has changed:*****(Note: this will be used as the effective date of change if the pay band changes)*** | **Date......................** |

#  **SECTION 1A: SUBMISSION CHECKLIST: Changed Jobs**

One of the aims of AfC is to allow NHS organizations to operate more flexibly by developing

roles in partnership.

Where a post holder and their manager agree that the demands of the post have changed

significantly, then a re-match or re-evaluation of the post needs to be carried out.

The process requires details of the changed job demands that have led them to believe there is

a change in factor levels.

These must be highlighted in the revised job description and summarized below.

|  |
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| The Head of Human Resources must send the submission form and all associated paperwork via email to the Job Evaluation Unit. Submissions must include: |
| 1. The original job description used in the job matching/evaluation process.
2. A copy of the matched job or evaluation report relating to the original job description and grading outcome.
3. Revised job description, clearly showing additions and revisions as appropriate.
4. A full organizational chart showing the post to be graded.
5. A note of any similar posts in the organization that may be comparators.
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#  **SECTION 1B: SUBMISSION CHECKLIST: New Jobs**

This procedure should be used where a new role to the service has been created and there is no

post holder in post. New jobs will need to be matched or evaluated in order that a pay band can

be determined for recruitment purposes.

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| The Head of Human Resources must send the submission form and all associated paperwork via email to the Job Evaluation Unit. Submissions must include: |
| 1. The agreed job description to be used in the job matching/evaluation process.
2. A full organizational chart showing the post to be graded
3. A note of any similar posts in the organization that may be comparators.
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#  **SECTION 2: JOB DETAILS**

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| --- | --- |
| **Submission category** **(New or Changed job)** |  |
| **Job title** |  |
| **Previous job reference** **(for Changed Jobs as recorded on TURASJE – available from HR)** |  |
| **Current Pay Band** **(Changed Jobs only)** |  |
| **Date when last matched/evaluated** |  |
| **Department**  |  |
| **Service/Directorate/HSCP** |  |
| **Number of postholder(s)** |  |
| **Department/service reference number (if used)** |  |

**SECTION 3: SUMMARY OF CHANGES/ADDITIONS (FOR USE IN CHANGED JOB**

**SUBMISSIONS ONLY)**

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| Briefly summarise the changes to the duties and responsibilities now being undertaken. It may be helpful to use headings when describing the changes and then list these using bullet points. **Please do not copy all of the changes made to the job evidence and list these below. Use one or two sentences to describe the changed elements.** Please indicate the sections of the job description that have been updated below. ***Avoid the use of phrases and terminology from the Job Evaluation Scheme or national profiles in the submission and also in the job description document.***  |
| **Section heading** | **Summary of job changes, additions, revisions** |
| *Example:* *Main Duties, People Management*  | *Example:**The postholder is now responsible for completing annual appraisals and personal development planning for a team of 4.*  |
|  |  |
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#  **Section 4: JOB EVALUATION OUTCOME**

#  **(Completed by Job Evaluation Unit)**

|  |  |
| --- | --- |
| **TURASJE Job reference** |  |
| **AFC Pay Band** |  |
| **National Profile used** |  |
| **Job Status** |  |
| **Consistency check completed on (date)** |  |
| **Date notified to Head of Human Resources** |  |

**Appendix 2**

 **Appendix 2**

**AGENDA FOR CHANGE JOB EVALUATION SCHEME**

**REVIEW SUBMISSION FORM – PART A**

This form should be used to submit additional job information for use in the Job Evaluation Review

procedure. The form should also be used where employees disagree with the banding outcome for

their post but do not wish to submit any additional information.

The additional information contained in the form must be agreed between the employee(s) carrying

out the role and the line manager.

The form must be submitted by email to the Job Evaluation Unit by the Head of Human Resources,

following authorisation by the appropriate Line Manager. A copy must be retained in each employee’s

personal file.

**Please use ‘Review Submission Form’ as the subject header when sending completed**

**forms to the Job Evaluation Unit. Please remember to complete Part A and Part B when**

**submitting Review information.**

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| **Section 1: Job Details** |
| Job Title |  |
| Job id no (from the matched job report) |  |
| Department |  |
| Service (Acute/HSCP/Corporate) |  |
|  |  |
| Name of employee who can be contacted by the Review panel for additional information/clarification |  |
| Email address |  |
| Name of Line Manager who can be contacted by the Review panel for additional information/clarification |  |
| Email address |  |

**AGENDA FOR CHANGE JOB EVALUATION SCHEME**

**REVIEW SUBMISSION FORM – PART B**

This form should be used in conjunction with Part A to submit additional job information for use in the

Job Evaluation Review procedure. The additional information contained in the form must be agreed

between the employee(s) carrying out the role and the line manager.

|  |  |
| --- | --- |
| **JOB TITLE** |  |
| **Job ID**  |  |
| **Section 1: Reason for requesting a Review** |
| **1. Post should be matched to a different National Profile**  |
| *Please explain why you feel another National Profile is more appropriate (in no more than 50 words)* |
| **2. Job Information was not included in the original job description submitted.**  |
| **Any duties described must have been carried out as part of the post holder's job responsibilities at the date when the job description content was agreed and/or the effective date of these being carried out.** **Please briefly describe the nature of the job responsibilities. You must also complete the relevant Factor box(es) in Section 3 to provide fuller information on specific responsibilities.** **Information should be submitted only for those factors where the employee(s) disagree with the level awarded by the original matching panel.** |
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| **Section 2** |
| **JOB****EVALUATION FACTOR** | **RELEVANT JOB INFORMATION**  |
| **If you agree with the factor level allocated there is no requirement to supply any additional information.**  |
| 1.  | Communications & Relationship skills |  |
| 2.  | Knowledge, training & experience |  |
| **3.**  | **Analytical & judgemental skills** |  |
| 4.  | Planning & organising skills |  |
| 5.  | Physical Skills |  |
| 6.  | Responsibility for Patient/Client care |  |
| 7.  | Responsibility for policy/service development |  |
| 8.  | Responsibility for financial & physical resources |  |
| 9.  | Responsibility for human resources |  |
| 10.  | Responsibility for information resources |  |
| 11.  | Responsibility for research & development |  |
| 12.  | Freedom to act |  |
| 13.  | Physical effort |  |
| 14.  | Mental effort |  |
| 15.  | Emotional effort |  |
| **16.**  | **Working conditions** |  |