

Livewell Southwest

**Job Matching and Evaluation
Policy and Procedure**

Version No. 2.2

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Notice to staff using a paper copy of this guidance.

The policies and procedures page of LSW intranet holds the most recent version of this document and staff must ensure that they are using the most recent guidance.

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Reader Information

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Document review history

Version no.	Type of change	Date	Originator of change	Description of change
1	New Policy	August 2016	HR Policy Group	New document
1.1	Minor	December 2016	Deputy Head of HR	Change to the form
1.2	Minor	January 2017	Deputy Head of HR	Change to the form, appendix 2.
1.3	Extended	July 2018	Head of HR & Staff Wellbeing	Extended
1.4	Extended	January 2021	HR Administrator	Extended
1.5	Minor	May 2021	HR Administrator	Updated form added in appendix 1
1.6	Extended	October 2021	Associate Director of HR & Engagement	Extended
2	Reviewed	September 2022	HR Department	Reviewed, no changes
2.1	Reviewed	October 2022	Deputy Director of People	HR postal address removed throughout and replaced with HR e mail address.
2.2	Reviewed	August 2024	HR Department	Appendices removed and changed to links.

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Job Matching and Evaluation Policy and Procedure

1 Introduction

- 1.1 Livewell Southwest is committed to fairness and equity and values diversity in all aspects of its work as a provider of health and social care services and as an employer of people. We constantly strive to build a workforce that is representative of the community it serves. We aim to operate a fair, consistent and equitable job matching and evaluation scheme, based on the job required by the organisation and not the person doing it or the number of hours required.
- 1.2 Livewell Southwest is committed to eliminating all forms of discrimination on the grounds of age, disability, gender reassignment, marriage / civil partnership, pregnancy maternity, race, religion or belief, sex and sexual orientation in the provision of our services and in recruitment and employment. This enables an environment that is characterised by dignity and respect which is free from harassment, bullying and victimisation.
- 1.3 This policy and procedure sets out Livewell Southwest's local arrangements for job matching and job evaluation under the national framework of Agenda for Change (AfC) and applies to all posts on AfC terms and conditions of service.
- 1.4 Partnership working between Livewell Southwest and union partners will underpin this policy and procedure.

2 Purpose

- 2.1 The purpose of this document is to ensure that new posts and those that have undergone significant changes are appropriately matched and evaluated in accordance with the NHS Job Evaluation Scheme (JES). Whilst the job matching and evaluation processes described in this document aims to simplify the detailed arrangements contained in the Job Evaluation handbook, they are not a substitute. The handbook will be the main source of information.
- 2.2 The aim is to achieve consistency of matching and evaluations, against local matching and evaluations and against national benchmark profiles, in order to maintain consistency with similar jobs.

3 Definitions

- 3.1 **Job matching** - occurs when trained staff are able to match a job description to a nationally agreed profile that 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 www.nhsemployers.org.
- 3.2 **Job evaluation** - occurs only when it has not been possible to match a post against an AfC national profile because the role is unique and/or significantly different to other similar roles elsewhere in the NHS.

3.3 Job Analysis Questionnaire (JAQ) – a tool used to evaluate posts which are unable to be matched against an AfC national profile.

3.4 Significant change – for the purposes of this policy a significant change is defined as:

- Considerably increase or decrease to the knowledge, training and experience necessary for the job, or;
- Considerably increase or decrease to the freedom to act of the post holder.

4 Duties & responsibilities

The **Chief Executive** is ultimately responsible for the content of all policies, implementation and review.

4.1 Human Resources will oversee the operation and monitoring of the Job Matching and Evaluation Policy and Procedure and will be responsible for facilitating the process, organising panels and communicating outcomes.

4.2 Job matching/evaluation leads - Livewell Southwest recognises the importance of partnership and therefore will share the ownership for job matching and evaluation processes with recognise unions through the identification of two job matching/evaluation leads; one management and one trade union. The job matching/evaluation leads should have knowledge of the JES and will:

- Advise employees, managers, and union representatives about job matching/evaluation good practice.
- Ensure there are adequate numbers of trained individuals to match and evaluate jobs.
- Keep up to date with job matching/evaluation developments and share recommended practices locally.

4.3 Consistency panel - it is the responsibility of the consistency panel to:

- Ensure outcomes are checked against other local matches within the same occupational group, job family and other local matches within the same pay band.
- Query any apparent inconsistencies in the matching/evaluation of the post.

4.4 Trained job matchers/evaluators - it is the responsibility of trained job matchers/evaluators to:

- Work in partnership to match/evaluate jobs fairly and in accordance with the AfC JES.
- Maintain strict confidentiality with regard to all aspects of work, decisions and discussions undertaken as panel members.
- Commit to participate in panels on a regular basis in order to maintain their skills and to enable jobs to be processed without delay.
- Complete the required documentation accurately, clearly and comprehensively.

4.5 Line managers – it is the responsibility of managers to:

- Ensure staff hold a current, accurate job description which is reviewed in discussion with them on an annual basis as part of the appraisal process.
- Ensure staff must not be expected to routinely perform duties beyond the remit of their job description.
- Obtain approval in principle from their line manager before any proposed changes to banding are discussed with the post holder.
- Ensure funding is available when supporting the submission of a changed job for matching/evaluation.
- Consider the banding of jobs within teams that are affected when a change of responsibilities for one job impacts on the responsibilities of another.

4.6 Employees - it is the responsibility of employees to ensure that their requests for re-banding are submitted in accordance with this policy and work in partnership with their manager to accurately reflect the duties and responsibilities of their post in their job description and person specification.

5 General principles

5.1 Banding of posts will arise in the following circumstances:

- A new funded post has been created.
- Significant changes in the responsibilities of a post (not volume of work).
- The post holder and their manager feel that a post is incorrectly banded.
- Where vacancies in the structure lead to a reorganisation of work and the need to adjust the duties of a post.
- A re-banding request initiated by an individual employee and supported by the line manager.
- A re-banding request initiated by the line manager in respect of a post under their service.

5.2 Where a project or an objective is set for a post holder which is new but does not significantly increase responsibility, it is not appropriate to submit the updated job description for banding.

5.3 In every circumstance, it is the post that is matched or evaluated not the individual who happens to be in the post at any given time.

5.4 The outcome of any matching/evaluation process on a current job role may result in a decision to increase or decrease the band of a post or for it to remain unchanged.

6 Procedure

6.1 New post

6.1.1 Before a new post can be advertised it should be job matched/evaluated to a national profile so that an indicative pay band may be determined for recruitment purposes.

- 6.1.2 In exceptional circumstances, and in agreement with the job matching/evaluation leads, if posts require advertising, prior to the manager receiving the matching outcome, or when an indicative pay band is established, the post must be advertised with the pay band subject to full evaluation. It should be born in mind by managers that this is only an indicative outcome and that there is a possibility of a lower/higher outcome at full matching/evaluation.
- 6.1.3 When a new role is identified, the manager will prepare a job description and person specification using Livewell Southwest's guidance and templates attached as Appendices 1. Advice is also available from the HR Department.
- 6.1.4 The manager should complete the job matching/job evaluation form set out in Appendix 2. Following receipt of these documents a job matching/evaluation panel will be arranged.
- 6.1.5 The line manager may be contacted by the matching/evaluation panel should they require clarification of any detail or any further information in order to band the post. Managers may be contacted by a panel, to answer questions the panel may have regarding the request or supporting documentation. In order to protect the anonymity of the panel, under no circumstances, will the line manager or the post holder be required to attend a meeting with the panel.
- 6.1.6 Following a consistency checking process, HR will write to the manager and inform them of the outcome of the matching/evaluation.

7 Job matching panels

- 7.1 The process of matching the job description and person specification to the national AfC profiles will be undertaken in accordance with the national Job Evaluation handbook and results will be stored electronically to aid the process. The HR Department will assign a unique reference code to the documentation pack in preparation for a matching panel.
- 7.2 A team of trained AfC matchers will normally comprise of four members (two management representatives and two accredited union representatives). Where this is not possible then as a minimum a panel must comprise at least three members with at least one member from management and one accredited union. They will meet on a monthly basis to undertake panels or when a panel is required.
- 7.3 If it is not possible to match the job description and person specification to a national AfC job profile or the panel fail to reach an agreed outcome this will be reported to the job matching/evaluation leads who will consider the situation and determine the most appropriate course of action e.g. referring the job to a different panel, referring the job description back to the line manager for revision and amendment before returning to a second panel, or for a Job Analysis Questionnaire (JAQ) to be completed.

8 Job evaluation panels

- 8.1 Job evaluation occurs only when it has not been possible to match a post against an AfC national profile. The job is likely to be **unique and/or significantly different** to other similar roles elsewhere in the organisation following AfC. Posts which are unable to be matched against a national profile will be evaluated by the post holder, or if a new post the line manager, completing a JAQ.
- 8.2 Once the JAQ has been completed a meeting will be held with two trained job analysts (one management and one union) to undertake a job analysis interview with the post holder and/or line manager. Following the job analysis the JAQ may be amended and will need to be agreed and signed by the post holder and their line manager.
- 8.3 The completed JAQ will then be submitted to a job evaluation panel for banding and will subsequently be consistency checked.
- 8.4 Posts will not normally be job matched/evaluated within 12 months of a previous matching and evaluation review unless there is clear evidence to demonstrate significant changes to the role and responsibilities, or a relevant new national profile is published.

9 Consistency panels

- 9.1 The aim of the consistency panel is to ensure the job matching/evaluation outcomes are consistent and reliable in order to avoid grading anomalies within the organisation and consequent review requests.
- 9.2 The consistency panels will normally comprise of four members (two management representatives and two accredited union representatives) all who have been trained in job matching and/or job evaluation as required. Where this is not possible then as a minimum a panel must comprise at least three members with at least one member from management and one accredited trade union representative. The panel members will not include more than one representative from the original job matching/evaluation/review panel.
- 9.3 Any inconsistencies found will be referred back to the original panel for review with notes from the consistency panel regarding which factors require further reconsideration. However, the Consistency panel may contact the manager responsible for clarification or to ask further questions as appropriate regarding the documentation.
- 9.4 Where apparent inconsistencies in banding across the organisation are brought to the attention of managers, the job matching/evaluation leads should be notified, who will arrange for this to be investigated and appropriate action taken as necessary, to restore consistency in the pay structure.

10 Job matching/evaluation appeals procedure

- 10.1 If the post holder is dissatisfied with the outcome of the job matching/evaluation exercise, they have the right of appeal. They must notify their manager in writing, stating the reasons for appeal using the job matching/evaluation appeals form attached as Appendix 3 within three months from the date of outcome letter.
- 10.2 In order for an appeal to be undertaken the post holder must provide details of where they disagree with the match/evaluation and provide evidence to support this. An appeal should only be requested if the post holder can demonstrate that incorrect or insufficient information concerning the dimensions of the job were presented to the original matching/evaluation panel.
- 10.3 HR will arrange for an appeal panel to be convened at the earliest opportunity which will comprise a new matching panel and they will consider the original matching outcomes based on the information provided on the job matching/evaluation appeals form completed by the post holder.
- 10.4 There will be no further right of appeal once this procedure is exhausted. However, if the post holder believes the **process** was carried out incorrectly they may pursue this through the Grievance Procedure.

11 Training implications

- 11.1 Livewell Southwest and unions will ensure that all job matching/evaluation panel members receive full training.
- 11.2 Newly trained job matchers/evaluators will be supported and given opportunity to match/evaluate with experienced panel members in order to become accustomed to the process of job matching/evaluation.
- 11.3 Guidance for managers is set out in Appendix 1 and a flowchart in Appendix 4.

12 Monitoring compliance

- 12.1 This document will be reviewed every three-years or earlier if required, e.g. due to legislation changes.
- 12.2 The HR Department will be responsible for monitoring the effectiveness of this policy in conjunction with managers and union partners.

All policies are required to be electronically signed by the Lead Director. Proof of the electronic signature is stored in the policies database.

The Lead Director approves this document and any attached appendices. For operational policies this will be the Head of Service.

The Executive signature is subject to the understanding that the policy owner has followed the organisation process for policy Ratification.

Signed: Director of People and Professionalism

Date: 30th September 2022