



Public – To be published on the Trust external website

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1 Introduction

Agenda for Change (AFC) is the NHS national terms and conditions of service for non-medical staff. The Job Evaluation Scheme is an integral underpinning structure which is used to analytically determine the pay bands of roles within the NHS.

This procedure is critical to the delivery of OJTC and our ambition to co-create safe and personalised care that improves the lives of people with mental health needs, a learning disability or autism. It helps us deliver our three strategic goals.

This procedure supports the trust to co-create a great experience for all patients, carers and families from its diverse population by providing an assurance we are committed to working in line with the requirements of the Equality Act to provide equal pay for equal value.

This procedure supports the trust to co-create a great experience for our colleagues by committing to working in partnership with our staff side colleagues to implement the national job evaluation scheme.

2 Purpose

Following this procedure will help the Trust to demonstrate adherence to the required standards outlined within the Agenda for Change Job Evaluation Handbook. The nationally agreed Job Evaluation Scheme will be used to determine the correct band for all AFC posts across the organisation. The scheme will be operated in a robust and transparent manner and in accordance with the agreed procedures detailed in this document.

This will enable us to effectively demonstrate:

- the Trust's approach to job evaluation
- Providing clear procedures
- Confirming the responsibilities of staff
- Setting standards against which the scheme will be monitored
- Identifying the records to be kept to ensure an effective audit trail

3 Who this procedure applies to

This Procedure applies to all staff employed in a role which falls within the remit of Agenda for Changes terms and conditions. The Procedure below outlines the process line managers must follow to determine a pay banding or re-banding of a post(s).

4 Related Documents

[Recruitment and Selection Procedure](#)
[Organisational Change procedure](#)

5 Procedure

5.1 Process for the banding of a New Post – Matching a Job Description to a National profile

Step 1 - Line Manager

Write job description using the Trust template [Job Description Template](#)

As appropriate forward to designated professional lead for review. Forward job description, (including effort factors) and job description request form [Job Evaluation Request Form](#) to katie.downs@nhs.net, Lead Administrator for Job Evaluation.

Step 2 - Lead Administrator for Job Evaluation

Reviews and quality checks all documents to ensure they meet the requirements to proceed to a job evaluation panel. The Lead Administrator will liaise with line manager to obtain missing documents.

Step 3 - Lead Administrator for Job Evaluation

The Lead Administrator will schedule the new post for the next available job evaluation panel. All of the required information for the panel will be saved in the job evaluation shared folder a minimum of 2 days prior to the date of the panel and an email confirmation will be sent to panel members.

Step 4 - Job Evaluation Panel Members

Prior to the panel meeting all panel members will read the job description and look to identify potential national profiles for the panel to consider, all national profiles can be found ([hyperlink](#)) The panel will comprise of management representative(s) and staff side representative(s) all of whom will have completed training in job matching/evaluation.



The panel will aim to match the job description to a national profile.

It is anticipated that the vast majority of Job descriptions should match a national profile and therefore **the manager of the Job Description under consideration ideally should be available to answer any queries the panel may have.**

Following discussions with the manager, if it is still not possible to match the Job Description to a national profile **then full Job Evaluation is required and the JAQ process will take place – Please refer to Section 5.3 for the JAQ process**

Step 5 - Consistency Checking Panel - (When the Panel has matched the JD to a national profile)

Following the conclusion of the Job Evaluation panel a consistency checking panel will meet to review the outcome. The panel will comprise of a management representative and staff side representative both of whom will have completed training in consistency checking. Feedback on the outcome of the job evaluation panel will be provided with a view to reaching a consensus and the banding of the new post finalised.

Step 6 - Lead Administrator for Job Evaluation

The Job Evaluation Lead Administrator will complete all of the associated admin tasks and inform the line manager of the outcome of the evaluation.



The line manager may request a review (appeal) of the band outcome for a new post, prior to commencing the recruitment process, by submitting a revised job description showing the changes made - using the 'track changes' function.

Review documentation [Review Request Form](#) must be submitted to the Lead Administrator for Job Evaluation within 3 months of notification of the band outcome.

The review (appeal) panel operates in the same way as the original panel and follows the procedure outlined in **Step 4 above**.

There is no further right of review in respect of the band outcome. A revised job description cannot be submitted for at least twelve months from the date of notification of the outcome to the line manager except where there is clear evidence that service needs have changed significantly which impact on the post or where a job description has changed following the 6-12 month bedding in period for a new post.

5.2 Re Match or Re-evaluation Requests (Regrade applications)

A post holder may request in writing to their line manager that their existing job description is reviewed and amended if they believe that their role has changed significantly, due to service need from when it was last evaluated.

Step 1 Post Holder and Line Manager

If the line manager agrees the existing Job description requires updating to accurately reflect the role. The existing job description will be amended using "Track Changes" to accurately reflect the current duties and agreed by both parties. The Line Manager will complete a Regrade Authorisation Form [Regrade Authorisation Form](#) and forward on for completion as indicated on the form. The completed form and job description showing 'Track Changes' should be forwarded to the Lead Administrator for Job Evaluation.



In circumstances where there is a failure to agree advice should be sought from the designated People Partner representative.

It should be noted that where an individual has undertaken additional duties for the purpose of personal development, the original post is unaltered and the post will not be considered for re- grading. The individual may choose to discontinue the performance of such duties.

Step 2 Lead Administrator for Job Evaluation

Will review and quality check documents to ensure they meet the requirements to proceed to a Job Evaluation panel. The Lead Administrator will liaise with line manager to obtain missing documents.

Step 3 Lead Administrator for Job Evaluation

The Lead Administrator will schedule the updated job Description for the next available job evaluation panel. All of the required information for the panel will be saved in the job evaluation shared folder a minimum of 2 days prior to the date of the panel and an email confirmation will be sent to panel members.

Step 4 - Job Evaluation Panel

Prior to the panel meeting all panel members will read the job description. The previous matching/evaluation outcome will be available for the panel. The outcome of the panel can be one of the following:

- Confirm the same match/evaluation outcome as the original
- Confirming a match to a different profile (if a different profile cannot be matched after discussions with the Manager and Post holder, then a JAQ will be required in line with section 5.3)

The panel will comprise of management representative(s) and staff side representative(s) all of whom will have completed training in job matching/evaluation.

Step 5 Consistency Checking Panel

The consistency checking panel will operate in the same way as outlined in **Section 1 Step 5 above**

Step 6 Lead Administrator for Job Evaluation

The Lead Administrator will complete all of the associated admin tasks and inform the line manager of the outcome of the regrade application.



If an employee is dissatisfied with the outcome of the job evaluation panel they have the right to request a review (appeal). It is strongly advised to seek advice from their staff side representative before proceeding with a review request.

Review documentation must be submitted to the Lead Administrator for Job Evaluation within 3 months of notification of the band outcome.

The post holder must complete the Review Request Form [Review Request Form](#) and obtain agreement of their line manager with regards to the content of their review request.

Any review must:

- Include clear statements of the grounds for review relating to specific job evaluation factors which are believed to have been scored incorrectly
- be based on the job description used by the original panel and not a job description which has had additional duties incorporated.

The line manager must agree with the review evidence provided by the post holder and forward directly to the Lead Administrator for Job Evaluation.

The review panel operates in the same way as the original one and follows the procedure outlined above for matching **S5.2 Step 4 above**



Where an individual or manager identifies that the individual is working to a different Job description (one that is already job evaluated) and the JD is a higher band, advice must be sought from the relevant People Partner on the appropriate process to implement transferring the individual onto the new job description.

Please note:

- A review can result in a lower band, the same band or a higher band. If a review request results in a lower pay band, please refer to section 6.3 below.
- The [grievance procedure](#) cannot be used in respect of band outcome but may be used to resolve process issues.

5.3 Process for completing a Job Analysis Questionnaire (JAQ) - Where a Job Description does not match a National Profile

Whilst it is envisaged most jobs will match to a national profile, there will be occasions where a JAQ will be required. A JAQ is a Job Analysis Questionnaire which is a comprehensive document which captures detailed information relating to each of the factors.

Step 1 – Lead Administer for Job Evaluation

- In circumstances where it is identified a JAQ will be required the Lead Administrator will liaise with the line manager and employee. The JAQ documentation and associated guidance will be forwarded for completion.

Step 2 - Job Holder and Line Manager

- The job holder with assistance from the line manager will complete the JAQ and return it to the Lead Administrator. On receipt of the completed JAQ arrangements will be made to appoint two JAQ analysts, one staff side representative and one management representative. JAQ analysts will have completed the national JAQ analyst training programme.

Step 3 - JAQ Analysts

- The Lead Administrator will schedule a meeting on behalf of the JAQ analysts with the post holder and line manager. The purpose of the meeting is to enable clarification on any points within the JAQ and ensure the document accurately reflects the requirements of the role. The outcome of the meeting will be an amended draft JAQ.

Step 4 - Job Holder and Line Manager

- The amended draft JAQ will be checked and signed off by the job holder, line manager and job analysts. Any differences of views will aim to be resolved with the assistance of job analysts. The outcome of this stage will be an agreed and signed off JAQ which will be forwarded to the Lead Administrator to progress to the Evaluation of the JAQ.

Step 5 - JAQ Evaluation Panel

- A panel of JAQ trained evaluators consisting of staff side representatives and management representatives will evaluate the JAQ. If required they will clarify any queries with the job holder and line manager.

Step 6 - Consistency checking panel.

- Following the conclusion of the JAQ evaluation review panel a consistency checking panel will meet to review the outcome. The panel will comprise of a management representative and staff side representative both of whom will have completed training in JAQ consistency checking. Feedback on the outcome of the JAQ evaluation will be provided to the panel with a view to reaching a consensus and the banding of the post being finalised.

Step 7 – Lead Administrator.

- The Lead Administrator will complete all of the associated admin tasks and inform the line manager of the outcome of the JAQ review.

5.4 Recording and Retaining Job Evaluation Outcomes.

The outcome of all job evaluations will be recorded on a database. All associated job descriptions and outcome paperwork will be saved electronically. The database will be available to Consistency checking panel representatives to support reporting and interrogation of banding outcomes or factor related outcome consistencies.

Any fundamental disagreements in relation to the Job Evaluation procedure should be addressed using the Trust's [Grievance Procedure](#) –

6 Contractual Issues

6.1 Effective Date

The effective date of any change in band for an existing post holder will be the date the review request was initially received by the line manager in writing.

6.2 Pay Increases

In the event of an upgrade, pay should be set at the minimum of the new pay band in accordance with AFC terms and conditions of service.

6.3 Lowering of bands

New posts: In the event that a pay band is lowered by a panel following the “bedding in” period and that this decision is upheld by a review panel, then, either the job description must be amended to include higher level responsibilities commensurate with the original band (where this does not conflict with service needs or the remit of other posts) or the post holder will receive pay protection in accordance with the Trust's [Organisational Change Procedure](#)

Existing posts: In the event that a review panel downgrades a post below its original band, the post holder will receive pay protection in accordance with the Trust's [Organisational Change Procedure](#).

6.4 Organisational inconsistencies


If an organisational review determines that a post or group of posts has been banded incorrectly, the revised band (if higher) will be applied with an effective date which takes account of the particular circumstances of the case. The revised band (if lower) will be applied in accordance with the Trust's [Organisational Change Procedure](#).

7 Definitions

Term	Definition
Agenda for Change	<ul style="list-style-type: none"> Nationally agreed terms and conditions for non-medical staff.
Job Description	<ul style="list-style-type: none"> A document which accurately describes the duties and responsibilities of a role. The job description

	will be used to evaluate a post and identify a pay band.
Effort Factors	<ul style="list-style-type: none"> The Job Evaluation process is based on assessing 16 bespoke factors which describe the requirements of the role. Each factor includes a range of descriptions which are assigned a score.
Job Evaluation	<ul style="list-style-type: none"> Job Evaluation is a process which is used to assess a broad range of varying roles using 16 effort factors to assign a pay band.
Job Analysis Questionnaire (JAQ)	<ul style="list-style-type: none"> A JAQ is a comprehensive document which is used to capture the details of a role where it is not possible to match a role to a national profile or a desktop evaluation is not appropriate.

8 How this procedure will be implemented



This procedure will be published on the Trust’s intranet and external website.

Line managers will disseminate this procedure to all Trust employees through a line management briefing.

The People and Culture Directorate will implement robust processes to demonstrate compliance with the Job Evaluation Procedure and Equal Pay legislation.

9 How the implementation of this procedure will be monitored

	Auditable Standard/Key Performance Indicators	Frequency/Method/Person Responsible	Where results and any Associate Action Plan will be reported to, implemented and monitored; (this will usually be via the relevant Governance Group).
1	100% of all new JD’s will be sent to JE panel with the aim of matching to a national profile, where this is not possible the JAQ process will be followed	On an annual basis audit will sample a proportion of advertised vacancies check the post has undergone job evaluation to determine the banding.	People and Culture leadership group will monitor actions identified.

10 References

- Agenda for Change Handbook - [Agenda for Change Terms and Conditions](#)
- Job Evaluation Handbook - [Job Evaluation Handbook](#)

<https://www.nhsemployers.org/publications/nhs-job-evaluation-handbook>

- National Job Profiles - [National Job Profiles](#)

11 Document control (external)

To be recorded on the policy register by Policy Coordinator

Required information type	Information
Date of approval	14 June 2024
Next review date	14 June 2027
This document replaces	HR-0034-v4 Job evaluation procedure
This document was approved by	P&C Policy Working Group
This document was approved	26 April 2024
This document was ratified by	Joint Consultative Committee
This document was ratified	14 June 2024
An equality analysis was completed on this policy on	01 May 2024
Document type	Public
FOI Clause (Private documents only)	n/a

Change record

Version	Date	Amendment details	Status
5	14 Jun 2024	Procedure updated. Changes made to reflect new version of Job Evaluation Handbook	Approved

Appendix 1 - Equality Analysis Screening Form

Please note: [The Equality Analysis Policy and Equality Analysis Guidance can be found on the policy pages of the intranet](#)

Section 1	Scope
Name of service area/directorate/department	People and Culture
Title	Job Evaluation Procedure
Type	Procedure
Geographical area covered	Trust wide
Aims and objectives	<p>The procedure will help the Trust to demonstrate adherence to the required standards outlined within the Agenda for Change Job Evaluation Handbook. The nationally agreed Job Evaluation Scheme will be used to determine the correct band for all AFC posts across the organisation. Complying with the requirements of the handbook will enable the Trust to demonstrate compliance with equal pay legislation.</p> <p>Following the procedure will enable us to effectively demonstrate:</p> <ul style="list-style-type: none"> ➤ the Trust's approach to job evaluation ➤ Provide a range of clear processes ➤ Setting standards against which the scheme will be monitored ➤ Identifying the records to be kept to ensure an effective audit trail
Start date of Equality Analysis Screening	updated May 2024
End date of Equality Analysis Screening	updated May 2024

Section 2	Impacts
Who does the Policy, Service, Function, Strategy, Code of practice, Guidance, Project or Business plan benefit?	Ensures the Trust is compliant with the law pertaining to equal pay and complies with Agenda for Change national terms and conditions of service.
Will the Policy, Service, Function, Strategy, Code of practice, Guidance, Project or Business plan impact negatively on any of the protected characteristic groups?	<ul style="list-style-type: none"> • Race (including Gypsy and Traveller) NO • Disability (includes physical, learning, mental health, sensory and medical disabilities) NO • Sex (Men, women and gender neutral etc.) NO • Gender reassignment (Transgender and gender identity) NO • Sexual Orientation (Lesbian, Gay, Bisexual, Heterosexual, Pansexual and Asexual etc.) NO • Age (includes, young people, older people – people of all ages) NO • Religion or Belief (includes faith groups, atheism and philosophical beliefs) NO • Pregnancy and Maternity (includes pregnancy, women who are breastfeeding and women on maternity leave) NO • Marriage and Civil Partnership (includes opposite and same sex couples who are married or civil partners) NO • Veterans (includes serving armed forces personnel, reservists, veterans and their families) NO
Describe any negative impacts	
Describe any positive impacts	

Section 3	Research and involvement
What sources of information have you considered? (e.g. legislation, codes of	Legislation in relation to equal pay. Agenda for Change National Terms and Conditions of Service Handbook.

practice, best practice, nice guidelines, CQC reports or feedback etc.)	Job Evaluation Handbook.
Have you engaged or consulted with service users, carers, staff and other stakeholders including people from the protected groups?	Yes
If you answered Yes above, describe the engagement and involvement that has taken place	Staff Side Representatives through the Staff Policy Working Group
If you answered No above, describe future plans that you may have to engage and involve people from different groups	

Section 4	Training needs
As part of this equality analysis have any training needs/service needs been identified?	No
Describe any training needs for Trust staff	
Describe any training needs for patients	
Describe any training needs for contractors or other outside agencies	

Check the information you have provided and ensure additional evidence can be provided if asked

Appendix 2 – Approval checklist

	Title of document being reviewed:	Yes/No/ Not applicable	Comments
1.	Title: Job Evaluation Procedure		
	Is the title clear and unambiguous?	Yes	
	Is it clear whether the document is a guideline, policy, protocol or standard?	Yes	
2.	Rationale		
	Are reasons for development of the document stated?	Yes	
3.	Development Process		
	Are people involved in the development identified?	Yes	Staff Policy Working Group
	Has relevant expertise has been sought/used?	Yes	AfC Terms and Conditions Job Evaluation Handbook
	Is there evidence of consultation with stakeholders and users?	Yes	PWG and JCC – National AFC Handbook
	Have any related documents or documents that are impacted by this change been identified and updated?	No	Not Applicable
4.	Content		
	Is the objective of the document clear?	Yes	
	Is the target population clear and unambiguous?	Yes	
	Are the intended outcomes described?	Yes	
	Are the statements clear and unambiguous?	Yes	
5.	Evidence Base		
	Is the type of evidence to support the document identified explicitly?	Yes	AFC Job Evaluation Handbook
	Are key references cited?	Yes	AFC Job Evaluation Handbook
	Are supporting documents referenced?	Yes	AFC Job Evaluation Handbook
6.	Training		
	Have training needs been considered?	Yes	

	Title of document being reviewed:	Yes/No/ Not applicable	Comments
	Are training needs included in the document?	Yes	No Specific Training identified
7.	Implementation and monitoring		
	Does the document identify how it will be implemented and monitored?	Yes	
8.	Equality analysis		
	Has an equality analysis been completed for the document?	Yes	
	Have Equality and Diversity reviewed and approved the equality analysis?	yes	20 Aug 2024
9.	Approval		
	Does the document identify which committee/group will approve it?	Yes	JCC
10.	Publication		
	Has the document been reviewed for harm?	Yes	
	Does the document identify whether it is private or public?	Yes	Public
	If private, does the document identify which clause of the Freedom of Information Act 2000 applies?	n/a	