



Shropshire, Telford  
and Wrekin

# Job Evaluation and Rebanding Policy

<b>Author(s) (name and post):</b>	MLCSU HR Team
<b>Version No.:</b>	Version 3.0
<b>Approval Date:</b>	August 2022
<b>Review Date:</b>	August 2025

## Document Control Sheet

<b>Title:</b>	Job Evaluation and Rebanding Policy		
<b>Electronic File Name:</b>	STW ICB Job Evaluation and Rebanding Policy		
<b>ICB Document Ref:</b>	HR023		
<b>Placement in Organisational Structure:</b>	Corporate Affairs		
<b>Consultation with stakeholders:</b>			
<b>Equality Impact Assessment:</b>			
<b>Approval Level:</b>	Audit Committee		
<b>Dissemination Date:</b>	September 2022	<b>Implementation Date:</b>	September 2022
<b>Method of Dissemination:</b>	Website / Staff intranet / Staff newsletter		

## Document Amendment History

<b>Version No.</b>	<b>Date</b>	<b>Brief Description</b>
Version 1.0 (Draft 1)	Nov 2018	First version
Version 2.0	Sep 2021	Revised version
Version 3.0	Aug 2022	Rebranded for the ICB.

The formally approved version of this document is held on the Shropshire, Telford and Wrekin Integrated Care Board website at:

<https://www.shropshiretelfordandwrekin.nhs.uk/>

Printed copies or those saved electronically must be checked to ensure they match the current online version.

## Contents

1. Introduction .....	4
2. Policy Statement .....	4
3. Scope.....	5
4. Responsibilities .....	5
4.1 Responsibilities of the ICB .....	5
4.2 Responsibilities of Human Resources .....	5
4.3 Responsibilities of Managers.....	5
5. New Posts – Prior to Recruitment .....	6
6. New posts – Reviews.....	6
7. Re-banding on a Substantive Basis .....	6
8. Re-banding on a Temporary Basis.....	7
9. Evaluation process.....	8
10. Job Matching Review Procedure .....	8
11. Monitoring .....	9

## **1. Introduction**

- 1.1.** This policy gives clarity on the procedure for rebanding posts that fall within the scope of Agenda for Change (excluding medical, dental and those on local terms and conditions and on very senior manager / board contracts), either on a substantive or temporary basis.
- 1.2.** By far the majority of roles include some elements of higher and lower banded work so any small variation in this, such as covering for colleagues in roles of a higher or lower band, is not normally related to a permanent review of banding. In some occasions, staff may be given opportunities to 'act up' into vacancies at a higher level; in these cases, there should be a selection process related to the appointments process.
- 1.3.** It is important to note that applications for rebanding should be based on the requirements of the post, not on the actual skills and experience of the post holder.
- 1.4.** It should also be noted that undertaking a greater volume of work at the same band does not normally constitute grounds for rebanding.
- 1.5.** If an employee is to be given additional responsibilities the line manager must ensure that if there is more than one post holder who could assume responsibility for those duties then a restricted competitive process is followed.
- 1.6.** It is important to consider that rebanding requests are an area which can often create anxiety for staff. It is important that good people management skills are employed across the ICB to avoid disappointment for staff who feel their contribution is not being fairly rewarded and as such the following points should be routinely taken into consideration by line managers.
  - Ensure all staff have a current, accurate job description, which is reviewed in discussion with them.
  - Ensure that staff are not routinely expected to perform duties beyond the remit of their job description and level of remuneration.
  - If it becomes necessary to extend an individual's duties, and responsibilities this should not be done unless managers can identify funding to support it. The ICB has an established level of funding against an established mix of staff. Any enhancement of the overall establishment needs to be funded by appropriate service development funding or, internal restructuring that identifies the necessary resources.

## **2. Policy Statement**

- 2.1.** It is recognised that posts often change and evolve over time, or new posts are developed as a requirement of service or organisational change. This policy has been prepared as part of the Agenda for Change (AfC) partnership working model to provide a mechanism whereby posts can be subject to the AfC matching/evaluation procedure to recognise essential role changes.
- 2.2.** Only significant changes within a job role are likely to affect matching or evaluation. These changes must be based on increased responsibility and not normally increased volume of work or length of service. When a job is identified as having changed significantly a decision needs to be made by the panel as to whether it is likely to match a national profile.

- 2.3. It should be recognised that a corporate perspective must be maintained at all times in relation to requests for matching. The initial response to a post holder requesting their post to be matched is for their line manager to clarify their role as per the existing job description and not to agree to a rebanding request until all the facts have been considered. Advice can be obtained from Human Resources.
- 2.4. Only essential service or organisational change should be considered as grounds to allow a job role to change.
- 2.5. This policy applies to both temporary and permanent changes to posts.
- 2.6. It is also recognised that on occasion a post may change less significantly, perhaps where additional responsibilities are allocated, however the change is not significant enough to warrant a change to pay band. (For further guidance see Appendix 1).
- 2.7. A revised Job description cannot be processed unless it is fully supported by the jobholder, line Manager and relevant Director. It is imperative that the revised job description presented is reflective of the individual post to be matched.
- 2.8. Best practice dictates that when specialist professional roles are being considered the professional lead should be consulted regarding the content of the job description and person specification (i.e. Nursing, Finance, etc.)
- 2.9. As any potential cost effect of the job matching process will be met from the relevant ICB budget, consideration of the financial impact in line with current agreed staffing establishments will need to form a major part of the consideration in agreeing a role can develop outside its existing pay band.
- 2.10. Services/departments may not progress a matching request that would impact upon similar jobs in other services across the ICB without undertaking full consultation and benchmarking with the other effected service directors. This process must involve oversight and consultation with Human Resources and be evidenced in the supporting documentation.

### **3. Scope**

- 3.1. This policy will apply to all employees of the ICB covered by the Agenda for Change Terms and Conditions.

### **4. Responsibilities**

#### **4.1 Responsibilities of the ICB**

- 4.1.1. The responsibility for the monitoring and provision of this policy initially rests with the Board of the ICB

#### **4.2 Responsibilities of Human Resources**

- 4.1.2. Human Resources are responsible for providing advice, guidance and support to line managers when considering re-banding requests and for the eventual submission of requests to the panel process.

#### **4.3 Responsibilities of Managers**

- 4.3.1 Managers are responsible for ensuring all requests are dealt with in a fair, equitable and consistent manner and in line with the policy.

- 4.3.2 Managers are also responsible for making fair and informed decisions in line with policy, legislative and regulative requirements.
- 4.3.3 **Managers are responsible for ensuring that job descriptions are maintained and updated as requested so that they accurately reflect the current reality of the duties. Job descriptions are normally reviewed as part of the employee's annual appraisal.**
- 4.3.4 Manager Guidance: How to write a Job Description (appendix 1) and Managers Guidance: How to update a Job Description (appendix 2) has been developed to assist managers in creating and updating job descriptions.

## **5. New Posts – Prior to Recruitment**

- 5.1. The recruiting manager will be responsible for drafting a comprehensive job description and person specification which accurately reflects the duties required of the post and the skills and abilities required of the person in the post. Where necessary, managers should seek advice from Human Resources.
- 5.2. Once complete, the job description and person specification should be submitted to Human Resources. A Job Matching Review will need to be carried out. See appendix 5 for the Job Matching Request Form.
- 5.3. Recruitment will then take place using the pay band that has been determined. Applicants will be made aware that the post will be subject to a further review. Once the post holder has been in the role for at least 6 months and no later than 12 months, the job can be fully evaluated.

## **6. New posts – Reviews**

- 6.1. The job description and person specification should be reviewed by the line manager with the job holder, in line with guidance, to determine whether it still truly reflects the role being undertaken or whether any changes need to be made. Once agreed, the job description and person specification should be signed by the job holder and line manager and then submitted to Human Resources for a review. Where there is more than one job holder, then arrangements should be made by the jobholders for a suitable member of staff to be responsible for conveying the opinions of the rest of the job holders and for agreeing the job description and person specification.
- 6.2. If agreement cannot be reached regarding the contents of the job description, then contact with Human Resources should be made to try to resolve the issues.

## **7. Re-banding on a Substantive Basis**

- 7.1. The following process must be applied when assessing a post in respect of a rebanding on a substantive basis:
- 7.2. Applicants will be required to complete the "Job Matching Request Form" (see Appendix 5) providing an explanation/supporting information on the factors within their current post that have changed since the previous AfC banding outcome to assist the panel.
- 7.3. The agreed completed request form should be returned to Human Resources together with:
- Current job description/person specification
  - Proposed job description/person specification clearly highlighting the agreed revisions

- Current and proposed Organisational Chart of the service to include existing posts and pay bands

- 7.4** On receipt of the documentation Human Resources will undertake a quality check to ensure all documentation is available to support the request. The manager will also receive an acknowledgment email and confirmation of when the request will be sent to a Job Matching Panel.
- 7.5** All documentation will be submitted to a Job Matching Panel (made up of at least three JME (Job Matching Evaluation) Practitioners that will include representation from both management side and staff side). The Panel will consider the request in accordance with the nationally agreed procedures and any locally adapted agreements. The panel will attempt to “match” the post to a national profile or determine if a Job Evaluation is required. The manager will be asked to be available (if possible) should the panel require any further clarification.
- 7.6** If a block application for rebanding is to be made from a group of staff on the same band, with the same job title and job description, then only one job description/person specification should be submitted on behalf of the whole group.
- 7.7** The outcome of the job matching panel will be notified to Human Resources and all relevant parties.
- 7.8** Following the job matching panel the manager will be informed of the outcome in writing.
- 7.9** If the Job Matching Panel is to undertake a Job Matching Review and the applicant’s application is unsuccessful, they have no further recourse – see Section 7 – Job Matching Review.
- 7.10** Re-banding applications will be backdated as appropriate.

## **8. Re-banding on a Temporary Basis**

- 8.1** Agenda for Change Terms and Conditions do not allow acting up within a banding. An employee taking on temporary additional responsibilities would need to have the temporary role assessed to determine whether it was necessary to re-band on a temporary basis to a higher band. To ensure a consistent approach, when employees are given additional responsibilities on a temporary basis, the following principles will apply: -
- 8.2** Any temporary arrangement must last at least one month and up to a maximum of 6 months, unless there are exceptional circumstances.

### **8.2.1 Taking on additional responsibilities within the same banding:**

If an employee agrees to undertake someone else’s job, they will remain within the same banding. There will be no incremental credit, however, this will be seen as an opportunity for development. Employees taking on another role should be assessed against that post outline to identify any skills and knowledge areas for development.

### **8.2.2 Taking on additional responsibilities within a higher banding:**

If an employee is required to undertake someone else’s job, in full, within a higher band they will be required to work to that job description and the grade of the post i.e. given the same higher banding. They will be put on a pay point that is the nearest above their existing salary. This will be a temporary rebanding (not acting up) in accordance with AfC Terms & Conditions of Service.

## **9. Evaluation process**

- 9.1 In the event that there has been an unsuccessful attempt to match to one or more national profiles or where there is no potential national profile available to match due to the post being unique or significantly different, the post will be referred for evaluation.
- 9.2 A Job Analysis Questionnaire (JAQ) must be completed by a jobholder(s) seeking advice from colleagues, a supervisor or line manager. A jobholder, or a jobholder representative of the post along with a line manager, will then be interviewed by 2 trained job analysts, one from management side and one from staff side to check, amend if necessary and verify the JAQ. A jobholder representative, if representing a group of staff may be accompanied by another jobholder for support if they so wish. The JAQ will be provided by the HR Team.
- 9.3 Once agreed, the JAQ is signed off by the jobholder, line manager and both job analysts. The agreed and signed off JAQ is evaluated by a joint evaluation panel, with the rationale and results for each factor entered onto the recording system.

## **10. Job Matching Review Procedure**

- 10.1 Should a manager or a post holder be dissatisfied with a job matching outcome they have the right to request a review. They must notify in writing to the next appropriate manager in line, stating the reasons for review and with the completed Job Matching Review form (see Appendix 6) within three months of the date of the outcome letter.
- 10.2 Human Resources will arrange for a Job Matching Review 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 completed Job Matching Review form completed by the post holder.
- 10.3 The decision of this panel will be final.
- 10.4 A member of staff has the right to invoke the Grievance Procedure if they are dissatisfied with the application of this procedure but not to request further panel considerations.
- 10.5 Equal Opportunities and Diversity
- 10.6 The Agenda for Change Rebanding Policy should be read in conjunction with the ICB's Equality and Diversity policy.
- 10.7 In applying this policy, the Organisation will have due regard for the need to eliminate unlawful discrimination, promote equality of opportunity, and provide for good relations between people of diverse groups, in particular on the grounds of the following characteristics protected by the Equality Act (2010); age, disability, gender, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, and sexual orientation, in addition to offending background, trade union membership, or any other personal characteristic.
- 10.8 Promoting diversity embodies the principles of fair treatment for all and will, as a result, improve the retention of staff. The ICB values the diversity of its workforce and aims to ensure that all staff understand this commitment and adhere to the required standards.

## **11. Monitoring**

- 11.1** This policy and procedure will be reviewed periodically by Human Resources in conjunction with the ICB and Trade Union representatives. Where review is necessary due to legislative change, this will happen immediately.

The following appendices are separate documents

**Appendix 1: Managers Guidance: How to write a Job Description**

**Appendix 2: Managers Guidance : How to update a Job Description**

**Appendix 3: Glossary & FAQs**

**Appendix 4: Job Matching Guide: the process**

**Appendix 5: Job Matching Request Form**

**Appendix 6: Job Matching Review Form**

# How to Write a Good Job Description

# What is a Job Description:

- A clear and concise description of what the job is.
- It should describe and explain the type of work that the postholder will be required to perform.
- It should focus on deliverable and tangible results.
- It is a document that provides sufficient detail for a reader to determine whether or not they are an eligible candidate.

## Why is it important to write an effective Job Description:

- It provides you with a much better chance of attracting and recruiting the right person for the role.
- A poorly written job description can slow down the recruitment process and potentially attract unsuitable candidates.
- A well written job description will showcase the organisation in the right way.
- The key to writing an effective job description is to find the balance between providing enough detail so candidates understand the role, while keeping your description concise.

# What is the main purpose of producing a Job Description:

- Whilst the primary purpose of producing a job description is to recruit a suitable applicant, it is not the sole function.
- It holds a continuing value throughout the employment lifecycle for both the employee and the employer.
- It forms part of the Contract of Employment (the main statement of particulars).
- From an employee's perspective, it is an accurate reference point for their responsibilities and expected level of performance, particularly when it comes to a review or appraisal.

# Points for consideration when developing a Job Description:

## Template documents

- You should refer to the organisation's template documents for a Job Description and a Person Specification.
- These will form the basis of your job description and person specification, which you can then add to accordingly.
- You should include an organisational structure chart.

## Organisational Structure Chart:

- Should set out who the jobholder will report to and who reports to the jobholder.
- It confirms to prospective candidates where the job role sits in the structure.
- Ensure that this document matches the job description, in terms of job title, reporting lines and content.

## The Job Description should not:

- Be developed with a particular 'person' in mind
- Be tailored to a particular Agenda for Change Banding

# Essential information to be included within the Job Description:

- Job title
- Band (once matched)
- Team/Department
- Responsible for
- Accountable to
- Job summary
- Organisational Chart (see slide 6)
- Main purpose of the job

## Job Title

- Ensure it is specific, this way you will be more likely to attract the right candidate.
- In most online job searches, the job title is the main word searched.
- It should be accurate, match the job/duties and be consistent with other job 'titles' within the department/wider organisation.

## Band

- Must be the result of a matching panel.

## Team/Department

- Specify the Team and Department which the job will sit within.

## Provide an understanding of relationships and interactions:

- Include reporting lines and working relationships.
- Reporting lines clarify the responsibilities of the position by showing who the post holder reports to and who reports to them.
- Working relationships are the clients/stakeholders that the post holder interacts with (both internally and externally).
- Outline other team members the postholder will be working closely with on a daily basis, as well as other key interactions .

## Job Summary:

- This section is important to attract attention and captivate the reader's interest.
- It should outline a brief and general statement of the most important functions and responsibilities of the job role.
- Provides an overview of the organisation and the expectations for the job role.

## Main purpose of the job:

- Describe the main duties and responsibilities associated with the role.
- Use straightforward, plain English phrases and sentences.
- Try not to be too prescriptive, the descriptions of duties should be concise and outcome-based, containing an action, an object and a purpose. *For example: 'compiles monthly reports to allow monitoring of the department's budget'.*
- The list of duties will vary in length depending on the role however you should aim to keep the list to a reasonable number of points, referring to the key areas of responsibility. *For example, Human Resources/Finance/Budget/Project management.*
- Show job requirements as areas of responsibility and the deliverables expected, try to use active verbs, e.g. 'to manage', 'to develop', 'to write', 'to clean' and 'to focus' not "to support" or "to assist"

## Main purpose of the job:

- If the job role has line management responsibilities, this should be reflected. *For example, line management of the admin team - this will include day to day management of the admin team, undertaking appraisals and development/ performance reviews.*
- Job descriptions for equivalent roles (i.e. another Admin Band 3) should be the same, although they could be responsible for different activities. *For example, minute taking at a specific meeting.*
- Include any systems or software that the postholder will work on, likewise any projects or programmes; stating exactly what their responsibilities are within that context.

## Language and Terminology:

- Avoid using internal organisational terminology or acronyms (where possible).
- Check the language carefully to ensure that there is no terminology or role criteria which could be seen as discriminatory. e.g. avoid using gender specific or discriminatory wording. There are certain words and phrases that could be interpreted as discriminatory and using such language may restrict the diversity of applicants. *For example, 'the ability to drive', when the description should contain the locality in which the post holder is expected to travel.*
- Do not use the language of the Agenda for Change factor plan or profiles.

# The Person Specification:

- Should define the essential and desirable attributes against each of the criteria detailed below;
  - Experience (i.e. working with a certain projects/programmes)
  - Qualifications (i.e. degree level or equivalent)
  - Skills, knowledge and competencies (i.e. those relevant to the role)
  - Personal Qualities (i.e. personality traits and soft, interpersonal skills)
- This document should easily determine whether or not an applicant is suitably experienced; or the right type of person to carry out the job role.

## The Person Specification:

- Aids the recruitment and selection process for both managers and applicants. *For example, completion of the application form and development of the competency-based interview questions.*
- Qualifications are necessary for some roles (i.e. a Nurse Practitioner). Ensure that the level of formal education required on paper is not higher than what is needed
- For many roles there should be alternative ways of achieving a certain level.
- Avoid asking for 'x many years' of experience as you may fall foul of both age discrimination and Gender discrimination law.

## The Person Specification:

- Rather than specifying years of experience specify the type, breadth or level of experience needed for the particular job and the skills and competencies required.
- Where possible try and list skills and competencies separately.
  - Skills are activities the candidate can perform based on what they have learned in the past, or from qualifications they have obtained.
  - Competencies are the traits or attributes you expect the candidate to display in the role.

*For example - a skill is delivering presentations, whilst an example of a competency could be strong communication.*

# The Person Specification:

## Summary

- skills, knowledge and aptitudes directly related to the job
- level and type of experience necessary
- education and training: necessary for satisfactory job performance
- any criteria relating to personal qualities or circumstances, which must be essential and directly related to the job, and must be applied equally to all groups, irrespective of race, religion or belief, gender, age, sexual orientation, disability, gender re-assignment, marriage/civil partnership or pregnancy/maternity. To do otherwise is potentially discriminatory.

# Person Specification:

## Assessment Key:

You should build into the person specification how the criteria will be assessed:

- A = Application Form
- I = Interview
- C = Certificate,
- T = Test/Assessment Centre

Care should be taken when consideration is given to how the candidate is going to be measured against these criteria. Avoid stipulating and assessing criteria at application stage that would only be assessed at interview such as communication and interpersonal skills . All tests are subject to reasonable adjustment and people with impairments must be allowed to undertake an assessment in a suitable alternative manner.

- Thoroughly review the document.
- Check for any spelling or grammatical errors.
- Avoid duplication.
- Send the Job Description to job matching.

# How to Update a Job Description

**Please note - this document should be read in conjunction with  
'How to write a Job Description' (*insert link*)**

## **When updating a Job Description you will need the following documents:**

- Job Description
- Person Specification
- Organisational chart

## **When updating the Job Description you should:**

Ensure what is documented is relevant and up to date for the role; i.e. the:

- Job title
- Responsible for
- Accountable to
- Job summary
- Main purpose of the job
- Person specification

## **Main duties and responsibilities:**

- Ensure the duties, responsibilities, description of the role and interactions of the job are up to date and relevant.
- Ensure there is consistency in relation to similar roles within the team (i.e. another Band 3 Admin role).

### **Reporting lines and working relationships:**

- Ensure the reporting lines are clear and up to date.
- Update any new or key working relationships (i.e. stakeholders) that the post holder will interact with, both internally and externally.

### **Standard Duties and Responsibilities (general terms):**

- Ensure the standard responsibilities for the job are relevant and up to date.

### **Person Specification:**

- Ensure the document is updated to reflect any changes made to the Job Description (i.e. changes in skills, qualifications and or experience).
- Note - this is not an opportunity to include any skills, experience or competencies that you would like an ideal candidate to possess but which the current post holder does not hold.

## Points to consider when updating a Job Description:

- Ensure that the Job Description is written in the organisations corporate style - use the templates to assist with this (if necessary).
- Any updates that are made should be reflected in both the job description and the Person Specification.
- Check that the organisational chart is up to date and matches the job description, in terms of job title, reporting lines and content.
- If you have job roles which have not been updated since the introduction of the Equality Act in 2010, check the language carefully to ensure that there is no terminology or role criteria which could be seen as discriminatory.
- Job base – consider whether it is still necessary to have a specific geographical base and revisit/update any reference to the requirements to travel.
- Involve the post holder – the current post holder could assist with updating the job description and person specification to ensure that it accurately reflects what they do on a day to day basis.
- It is unlikely that updating a job description will lead to a need for re-banding.
- A job role may require re-banding where the post holder is evidently working over and above their job description and there has been an increase in responsibility.
- A job role will not require re-banding where there has been an increase in volume, that is where a post holder has taken on more of the same tasks currently undertaken as part of a job description.
- Show job requirements as areas of responsibility and the deliverables expected, try to use active verbs, e.g. ‘to manage’, ‘to develop’, ‘to write’, ‘to clean’ and ‘to focus’ not “to support”, “to assist” or “to lead”
- Any changes are done via ‘track changes’ to easily identify the amendments of the revised job description and/or person specification.

## Glossary &amp; FAQs

Matching Panel	A job matching process is undertaken by trained matching panel members. A matching panel consists of both management and staff side representatives who use the job description, person specification and additional information to apply rules which “match” our jobs to nationally evaluated profiles.
National Profile	The NHS consists of similar roles throughout the country which share common features. To ensure consistency these roles have been evaluated Nationally and job profiles are a summary of these national evaluations. Our jobs are therefore “matched” against national job profiles which also determine which Agenda for Change pay band they should sit in. . Further information can be found at <a href="https://www.nhsemployers.org/case-studies-and-resources/2020/01/what-is-a-job-profile">https://www.nhsemployers.org/case-studies-and-resources/2020/01/what-is-a-job-profile</a>
Re-Banding	The process of submitting an updated job description to a matching panel.  The aim of this process is to determine whether the duties and responsibilities of the post have significantly changed since appointment and the band is still appropriate or to match to a new band if necessary.
Review	The process undertaken if you feel that the result does not reflect your role, you may request a review provided: <ul style="list-style-type: none"> <li>• The review request is made within 3 months of notification of the original panels banding decision.</li> <li>• The post-holder(s) provides details in writing of where they disagree with the evaluation.</li> <li>• The post-holder(s) must provide additional relevant job-related evidence to support their case for a review and have this agreed by an appropriate manager.</li> </ul> <p>In the event that groups of staff or individuals are dissatisfied with the result of matching they may request a review</p>
Match	The job description is a ‘match’ to a national profile and a banding can therefore be confirmed.
No Match	The job description does not match to any national profile and a banding can therefore not be confirmed. The job description will need to be sent to full evaluation or hybrid matching. The PSA will be able to explain this process to you.  NB It may be that a match is made at a band other than that expected by the post holder/manager. This is still a match not a “no match”. The review process is the method for dealing with these circumstances.
Quality Check	The process undertaken by the people services team prior to the job description being submitted to a matching panel to ensure that the panel have all the relevant information they need to carry out the matching process See question below.
Consistency Check	The process of ensuring the quality and consistency of all panel decisions. See question below.

## **Q. Where can I find more information about the job matching process?**

A. This can be found on within the Job Evaluation and Rebanding Policy, found, <https://www.shropshiretelfordandwrekinlcb.nhs.uk/type/hr-policies/>.

## **Q. Who can sit on a job matching panel?**

A. Any member of staff trained in job matching.

## **Q. Where can I find my job description?**

A. A copy should have been made available to you at interview and should be stored on your personal file. Please liaise with your line manager who should be able to provide you with a copy. The CSU does not hold a central store of all job descriptions.

## **Q. What do I do if I feel that my job description is not accurate**

A. Your job description should be looked at with your line manager at least annually at your appraisal. If this has not been done, then you would need to discuss this with your line manager and work together to update it to ensure it reflects the job that you are required to do.

## **Q. How often should I update a job description?**

A. Job descriptions should be updated as part of an employee's annual appraisal to ensure that it is still an accurate reflection of the role.

It is also good practice to update a job description prior to any new recruitment to ensure that it still meets the requirements of the role.

## **Q. How do I know if a job description needs to be submitted to matching?**

A. If it is a new job that has not previously been matched then it will need to be submitted to a matching panel. Alternatively, if the job has changed significantly then it may need to go to a matching panel. Your HR team will be able to help you decide.

## **Q. Where can I find example job descriptions to assist me in writing a new one?**

A. Information on how to write a job description is contained on Nugget and can be found [here]. Your HR team can support you if you need any further advice.

## **Q. Who can submit a JD for matching?**

A. Any individual with the support of their line manager or the line manager only in the case of new jobs.

## **Q. How long does the process take?**

A. Currently our KPIs are 10 days but we will keep in contact with you to confirm the likely date of your panel. If you are anticipating a restructure where several job matches will be needed, please contact your HR team as early as possible to enable planning of panels in advance.

## **Q. What quality checks does my job description undergo?**

A. When a job description is submitted, it will undergo a quality check. This will ensure that all documentation is present and completed correctly as well as checking that the quality of the job description is sufficient i.e., correct formatting, no track changes or highlighting still showing (apart from for re-banding requests), no discriminatory language etc

If the job description does not pass the quality check, you will be contacted with guidance on what needs to be amended.

## **Q. Why is a consistency checking process undertaken after the job matching panel?**

A. The matching report is submitted for consistency checking to ensure consistency against:

- Other matches completed by the same and other matching panels.
- 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.
- Check total weighted score and rank order of jobs for the organisation.

## **Q. Am I guaranteed an upgrade if I apply for my job to be matched?**

A. No a job matching panel will match the job to a national profile. This may be at your current band, a higher band, or indeed a lower band, depending on the changes made to your job.

## **Q. If my job is rebanded from what date will the new band take affect?**

A. The new band will take affect from the date the job was requested to go to a matching panel.

## **Q. What do I do if I do not agree with the outcome of the job matching?**

A. You are not able to appeal the decision purely on the basis that you are not happy with the outcome. If you feel that the result does not reflect your role, you may request a review provided:

- The review request is made within 3 months of notification of the original panels banding decision.
- The post-holder(s) provides details in writing of where they disagree with the evaluation.
- The post-holder(s) must provide additional relevant job-related evidence to support their case for a review and have this agreed by an appropriate manager.

The decision of the review panel is final and there is no further right of appeal.



## A guide for the management of the Job Matching Process

This document is designed to provide you with a helpful guide to support you through the job matching process.

### Developing a Job Description

- Please refer to the 'How to write a good Job description' guidance available on the ICBs intranet or shared drive.
- Contact your ICB People Services Team if you need further support or guidance

### Submitting a Job Description for matching

- Please submit Job Description and Person Specification, along with a completed Job matching request form to your ICB People Services Team. Please ensure that the submission also includes an organisational chart.
- Once received, the Job Description will undergo a quality check to ensure that it meets the expectations of the panel i.e. does not include discriminatory language, in correct format etc. If the job description does not pass the quality check, you will be contacted with advice on what amendments are required.
- Once the Job Description has passed the quality check, you will be contacted to be advised what date the Job Description will be matched by the panel. You are expected to be available during this time should the panel require any clarifications.
- You will be advised of the following 3 possible outcomes that you may receive
  - Matched
  - No Match
  - Job Descriptions moved to next available panel date with confirmation of when this is.

### Receiving an Outcome

- You will be provided with a matching report that details the outcome of the panel within 2 working days of the date of the panel. You will be advised if there is likely to be any delay in receiving the outcome.
- It is your responsibility to arrange for the matched job description to be saved in your employees personal file and/or relevant folder within your department.

### Review Process

- If you feel that the outcome does not reflect the role, you have 3 months in which you can request a review. To request a review please complete the Job Matching Review form and submit alongside a copy of the original matching report to your ICB People Services Team.

Please note that you are not able to appeal the decision purely on the basis that you are not happy with the outcome.

The decision of the review panel is final and there is no further right of appeal



## Appendix 5

### Job Matching Request

<b>Organisation</b>	
<b>Job Title</b>	
<b>Team</b>	

#### Type of request

Please indicate which request you are making

<b>New role</b>		<b>Re-banding</b>	
-----------------	--	-------------------	--

If you are submitting a re-banding request, please answer the following questions:

<b>Is this a permanent or temporary change? If temporary, please state an end date and reason.</b>			
<b>Will this change affect other posts with your service/function and how has this been assessed?</b>			
<b>What consideration has been given to the financial impact of this proposed change?</b>			
<b>Please attach a copy of the original job description and the updated job description (showing the additional duties via track changes)</b>			
<b>Embed original job description here or attach separately to the email.</b>		<b>Embed updated job description (including track changes here) or attach separately to the email.</b>	

#### Department structure

A department structure must be supplied as part of the job matching request. Please indicate how you are providing the structure.

<b>Embedded into JD</b>		<b>Attaching separately</b>	
-------------------------	--	-----------------------------	--

## Effort and Environmental Factors

These are factors that are not normally prescriptive within the job description and the panel requires this information to support the matching process.

### Physical effort

- (a) There is a frequent requirement for sitting or standing in a restricted position for a substantial proportion of the working time, or
- (b) There is a requirement to carry, lift, push or pull items – if yes kindly fill in the boxes below

<b>Definitions:</b>	Frequently – At least every other shift
	Occasionally – At least three times per month

<b>How often is the job holder expected to perform tasks of a physical nature?</b>	Choose an item.
<b>How long is the job holder expected to perform tasks of a physical nature?</b>	Choose an item.

<b>How often are mechanical aids provided when lifting/pulling/pushing?</b>	<b>What is the maximum weight involved when lifting/pulling/pushing?</b>
Choose an item.	Choose an item.

<b>How often is the job holder expected to lift/push/pull objects?</b>	Choose an item.
<b>Are mechanical aids provided when lifting/pushing/pulling objects?</b>	Choose an item.
<b>What is the maximum weight involved when lifting/pushing/pulling objects?</b>	Choose an item.

### Mental effort

<b>Definitions:</b>	Occasionally – Fewer than half the shifts worked
	Frequently – Half the shifts or more

<b>Is the job holder expected to perform duties of an unpredictable nature?</b> <small>This is where the jobholder is required to change from one activity to another at third party request</small>	Choose an item.
<b>How often is the job holder expected to be alert for 1-2 hours at a time?</b> <small>Such as checking detailed documents; carrying out complex calculations; taking detailed minutes of meetings</small>	Choose an item.

**How often is the job holder expected to be alert continuously for more than half a shift?**

Such as checking detailed documents; carrying out complex calculations; taking detailed minutes of meetings

Choose an item.

## Emotional Effort

### Definitions:

Frequently - On average once a week or more

Occasionally - Once a month or more on average

Rarely - Less than once a month on average

**How often does the job holder deal with distressing or emotional circumstances/ information or situations, directly or indirectly?**

	<b>Directly</b> where the jobholder is directly exposed to a situation/patient/client with emotional demands	<b>Indirectly</b> where the jobholder is exposed to information about the situation and circumstances but is not directly exposed to the situation/patient/ client
<b>Care of terminally ill</b>	Choose an item.	Choose an item.
<b>Dealing with difficult family circumstances/situations</b>	Choose an item.	Choose an item.
<b>Imparting unwelcome news to patients/staff/relatives/service users</b>	Choose an item.	Choose an item.
<b>Disciplinaries, grievances etc</b>	Choose an item.	Choose an item.
<b>Redundancy or redeployments</b>	Choose an item.	Choose an item.
<b>News of terminal illness</b>	Choose an item.	Choose an item.
<b>Severely injured bodies</b>	Choose an item.	Choose an item.
<b>Personal involvement with child abuse or family breakdown</b>	Choose an item.	Choose an item.
<b>Dealing with people with severely challenging behaviour</b>	Choose an item.	Choose an item.
<b>Dealing with patients/relatives as a result of a serious incident</b>	Choose an item.	Choose an item.
<b>Does the post holder read case notes/type reports of any of the above? Please detail which.</b>		

## Working conditions

<b>Definitions:</b>	Frequently - Several times a week and most shifts Occasionally - Three times a month on average Rarely - Less than three times a month on average
---------------------	---

	Exposure	Frequency
<b>Required to sit at a computer screen (VDU) more or less continuously</b>	Choose an item.	Choose an item.
<b>Travel by road</b>	Choose an item.	Choose an item.
<b>Work outdoors</b>	Choose an item.	Choose an item.
<b>Exposure to dirt, dust, smell, noise, inclement weather and extreme temperatures or verbal aggression</b>	Choose an item.	Choose an item.
<b>Fleas, lice, body fluids, foul linen, noxious fumes, etc</b>	Choose an item.	Choose an item.

## Contact details

The submitting manager must be available to answer any questions or to provide clarifications as part of the job matching process, please insert the relevant contact details below.

<b>Manager's name</b>	
<b>Telephone number</b>	
<b>Email address</b>	

## Declaration

I confirm that the job description is an accurate reflection of the duties required.

<b>Manager's signature</b>		<b>Date</b>	
----------------------------	--	-------------	--

## Appendix 6

### Job Matching Review Request

<b>Full Name</b>	
<b>Job Title</b>	
<b>Name of Line Manager</b>	
<b>Matched report reference number</b>	
<b>Date outcome received</b>	

Please complete all of the following information and by using the appropriate factor indicate your reason for this review request, clearly indicating information that you believe was not taken into account by the original matching panel.

Please attach the match report from the original matching panel

<b>Factor</b>		<b>Relevant Job information</b>
1	Communication and relationship skills	
2	Knowledge, training and experience	
3	Analytical and judgemental skills	
4	Planning and organisational skills	
5	Physical skills	
6	Responsibility for Patient/Client Care	
7	Responsibility for service development	
8	Responsibility for Financial and Physical Resources	
9	Responsibility for Human Resources	
10	Responsibility for Information Resources	
11	Responsibility for research and development	
12	Freedom to Act	
13	Physical Effort	
14	Mental Effort	
15	Emotional Effort	
16	Working conditions	

#### Declaration

I agree that the information contained within this form is a fair reflection of the job required by the ICB.

<b>Employee Signature</b>	
<b>Manager Signature</b>	
<b>Date</b>	