Job Matching Policy

V2.0

August 2019
Summary

Manager identifies need for new job description (JD) → Manager contacts HR practitioner to discuss

- Yes → Does a comparable job already exist in the Trust?
  - Yes → HR practitioner provides manager with copy of comparable JD and person spec’ together with Request for Job Matching form
  - No → Manager writes job description and person spec’ basing contents on existing JD

Manager writes new JD and person spec’ → Manager sends new JD and person spec’ to HR practitioner together with completed Request for Job Matching form

- Yes → Is JD and person spec’ deemed to be fit for purpose by HR practitioner?
  - Yes → Banding formally agreed by consistency checking panel → Process ends
  - No → JD returned to manager for amendment

- No → Can the new JD be benchmarked (see Section 6.3.)?
  - Yes → HR practitioner forwards all relevant documents to AFC administrator for review by next available job matching panel
  - No → Consistency checking quality assesses panel outcome and, where appropriate, provides advice and recommendations

HR practitioner advises Care Group General Manager/Head of Service → Process ends

- No → AFC administrator advises HR practitioner of outcome and any advice/recommendations made by the consistency checking panel

Confirmed banding reflects that anticipated by manager?

- Yes → HR practitioner advises Care Group General Manager/Head of Service → Process ends
- No → HR practitioner contacts line manager to discuss
# Table of Contents

Summary ........................................................................................................................................................................................................... 2  

1. Introduction .......................................................................................................................................................................................... 5  

2. Purpose of this Policy/Procedure .................................................................................................................................................. 5  

3. Scope ....................................................................................................................................................................................................... 6  

4. Definitions / Glossary .............................................................................................................................................................. 6  

5. Ownership and Responsibilities .................................................................................................................................................. 7  
   5.1. Role of the Trust Directors ................................................................................................................................. 7  
   5.2. Role of Care Group General Managers and Heads of Service .................................................................................... 7  
   5.3. Role of line managers .................................................................................................................................................. 8  
   5.4. Role of post-holders .................................................................................................................................................. 8  
   5.5. Role of HR practitioners ....................................................................................................................................... 8  
   5.6. Role of the Agenda for Change administrator ........................................................................................................... 9  
   5.7. Role of panel members ........................................................................................................................................ 9  
   5.8. Role of the Consistency Checking Panel ................................................................................................................... 10  

6. Standards and Practice ................................................................................................................................................................. 10  
   6.1. New roles ................................................................................................................................................................. 10  
   6.2. Vacant posts ............................................................................................................................................................. 10  
   6.3. Benchmarking .......................................................................................................................................................... 11  
   6.4. Changed jobs .......................................................................................................................................................... 12  
   6.5. The job matching process ........................................................................................................................................ 12  
   6.6. Unique posts .......................................................................................................................................................... 13  
   6.7. Time scales ............................................................................................................................................................. 14  
   6.8. Use of external job matching panels .......................................................................................................................... 14  
   6.9. Consistency checking ........................................................................................................................................ 14  
   6.10. Appeal of banding review outcome .......................................................................................................................... 15  
   6.11. Confidentiality ..................................................................................................................................................... 16  

7. Dissemination and Implementation ........................................................................................................................................ 16  

8. Monitoring compliance and effectiveness ..................................................................................................................................... 16  

9. Updating and Review ............................................................................................................................................................ 17  

10. Equality and Diversity ........................................................................................................................................................... 17  

Appendix 1. Governance Information ........................................................................................................................................... 18  

Appendix 2. Initial Equality Impact Assessment Form ............................................................................................................... 20  

Job Matching Policy V2.0  

Page 3 of 22
Data Protection Act 2018 (General Data Protection Regulation – GDPR) Legislation

The Trust has a duty under the DPA18 to ensure that there is a valid legal basis to process personal and sensitive data. The legal basis for processing must be identified and documented before the processing begins. In many cases we may need consent; this must be explicit, informed and documented. We cannot rely on opt out, it must be opt in.

DPA18 is applicable to all staff; this includes those working as contractors and providers of services.

For more information about your obligations under the DPA18 please see the Information Use Framework Policy or contact the Information Governance Team rch-tr.infogov@nhs.net
1. **Introduction**

1.1. The Royal Cornwall Hospitals Trust is committed to ensuring an equitable and robust pay structure through the application of a fair, consistent and transparent comprehensive job evaluation system across the Trust for all posts that are subject to national (formerly known as Agenda for Change) terms and conditions of service.

1.2. The operation of this policy and procedure is underpinned by the following principles.

- The Trust is committed to providing equal pay for equal work and to working in partnership with Staff-Side to ensure that this is delivered.

- The nationally agreed job evaluation scheme must be used to determine the correct pay band for all posts across the organisation. It is anticipated that the majority of posts will be matched to a national profile.

- The scheme will be operated in a robust and transparent manner and in accordance with the agreed procedures detailed in this document.

- The procedure will be supported by comprehensive records at each stage which may be used for effective evidencing of decisions, monitoring and audit purposes.

- Job descriptions and person specifications must accurately reflect the required work activities within the service and not the knowledge, skills and personal attributes or work preferences of the post holder.

- Where possible, generic job descriptions will be developed and used across the organisation.

- Re-grading applications should reflect a significant and tangible change in responsibility and/or associated knowledge and required skills, not just a change in workload. Examples must be given.

- The process will incorporate a step to ensure that the banding recommendations are checked for consistency and are in line with the existing structure of bandings in the organisation.

- All members of job evaluation panels will be appropriately trained and supported to ensure the integrity of the scheme is maintained.

1.3. This version supersedes any previous versions of this document.

2. **Purpose of this Policy/Procedure**

2.1. The policy aims to ensure that all jobs that are subject to national terms and conditions of service are evaluated in compliance with current legislation and in accordance with the NHS Job Evaluation Scheme. The Trust is committed to providing equal pay for equal work in partnership with Staff-Side to ensure that this is delivered.
2.2. This policy ensures effective implementation of the NHS Job Evaluation Scheme by:

- formalising the Trust approach to job evaluation
- providing clear procedures to be followed
- confirming the responsibilities of staff and managers
- identifying the records to be kept to ensure an effective audit trail.

3. Scope

The policy applies to the evaluation of job descriptions for new and changed roles that are covered by national terms and conditions of service.

4. Definitions / Glossary

- **Benchmarking** – the formal process of evaluating a new job description against a role that has previously been banded by a job matching panel. This can only be applied where the post-holder performs the same or similar function based on the same national profile eg the job description for a new specialist nurse might be benchmarked against a specialist nurse that already exists.

- **Designated panel contact** – the person (normally the line manager) nominated to provide additional information about the post under consideration in response to specific questions from the matching panel.

- **Desktop** – a process, normally undertaken by an HR practitioner/the AFC administrator and agreed in partnership with Staff-Side, to determine an indicative banding for urgent recruitment purposes or to ensure a job description is fit for purpose prior to its submission to formal job matching. Where an indicative banding has been applied for recruitment purposes, the job description should be reviewed by the line manager and post-holder, at least six months after their recruitment, to ensure it accurately reflects the actual duties and responsibilities of the post.

- **Hybrid matching/evaluation process** – (intended for use in a limited number of specific circumstances only) where a job matching has failed, the factors that have successfully matched are regarded as correct, and the remaining factors only are then subject to the local evaluation process. This is no longer current practice at the Trust and reference to the process was removed from the *NHS Job Evaluation Handbook* in September 2018.

- **Job analysis** – the process of determining what job is required and then defining and describing this in the form of a job description.
- **Job analysis questionnaire** – in exceptional circumstances, where it is agreed that no national profile exists against which to match a job description, the post-holder will be asked to complete a JAQ. The questionnaire is designed to obtain all the information necessary for the job to be evaluated.

- **Job description** – details the key responsibilities of the role. The job description should describe the job from the perspective of service needs and accountabilities.

- **Job evaluation** – a key part of the pay system that covers NHS staff on national (formerly known as AFC) terms and conditions of service. It enables jobs to be matched to national profiles or allows Trusts to evaluate jobs locally to determine in which pay band a post should sit.

- **Job families** – examples of job families are nursing and midwifery; allied health professionals; administrative and clerical; support services.

- **Occupational groups**: examples of occupational groups within job families are nursing; radiography; physiotherapy; finance; IT.

- **Person specification** – describes the knowledge, skills, experience and qualities required to fulfil the job description.

### 5. Ownership and Responsibilities

#### 5.1. Role of the Trust Directors

5.1.1. The Director of People and Organisational Development has overall responsibility for the strategic direction and integrity of the job evaluation process and the effective implementation and monitoring of this policy.

5.1.2. Directors of the Trust have responsibility for supporting and ensuring the integrity of the job evaluation process and its effective implementation within their own areas of accountability.

#### 5.2. Role of Care Group General Managers and Heads of Service

Care Group General Managers and Heads of Service have operational responsibility for:

- the implementation of this policy within their own areas of management accountability

- authorising appropriate requests for job evaluation and ensuring approved budgetary arrangements are in place with their Care Group Finance Manager

- advising line managers of quality checked job matching outcomes within five calendar days of receiving advice from the HR practitioner

- working towards the development and implementation of job family and occupational group job descriptions which consist of generic core duties and additional duties and responsibilities specific to an individual post.
5.3. **Role of line managers**

Line managers are responsible for:

- discussing the details of all new or changed jobs with their HR practitioner
- determining the job role and ensuring the job description is written to meet the needs of the service and accurately reflects the duties required of the post-holder
- ensuring post-holders are not expected to routinely perform duties beyond the remit of their job description
- in the case of changed posts, agreeing a revised job description with the current post-holder and ensuring this agreement, and the changes made, are clearly documented
- discussing the appropriateness of a re-grading application with a member of staff ensuring any application is supported by the relevant Executive Director, Care Group General Manager or Head of Service
- obtaining the required authorisation to proceed from their Care Group General Manager, Head of Service or Executive Director through completion of the approved documentation
- acting as, or nominating, a designated panel contact to answer any queries the AFC matching panel may have regarding the content of the job description. The designated panel contact must be available via the telephone on the day of the matching panel but, to retain the panel members’ anonymity, will not be present during the matching process
- ensuring they have further approval from their Care Group General Manager/Head of Service to implement any changes and that changes to banding are funded and within budget
- advising post-holders of quality checked job matching outcomes within three calendar days of receiving advice from the Care Group General Manager/Head of Service
- supporting the job matching process in the Trust by releasing trained members of staff to participate in panels and other Agenda for Change related activities.

5.4. **Role of post-holders**

Post-holders are responsible for:

- working in partnership with their line manager to accurately reflect the duties and responsibilities of their post to ensure it meets the needs of the service.

5.5. **Role of HR practitioners**

HR practitioners are responsible for:

- in partnership with Staff-Side, providing appropriate guidance to managers throughout the process; including benchmarking against posts that have previously been evaluated in the organisation and discussing organisational change implications where existing posts are submitted for re-grading
- ensuring that the job description and associated documentation is *fit for purpose* and complies with the Trust’s standard template
- providing the Agenda for Change administrator with all the paperwork required by the job matching panel
- liaising with the Agenda for Change administrator to identify job matching priorities.

### 5.6. Role of the Agenda for Change administrator

The Agenda for Change administrator is responsible for:

- setting up job matching and consistency checking panels as required
- where operationally possible, ensuring the matching panel is properly constituted, in accordance with the guidance contained in the NHS Job Evaluation Handbook, and meets the minimum requirements of three trained panel members, consisting of at least one Staff-Side and one management-side representative and that no potential conflict of interest exists
- ensuring the consistency checking panel is constituted of one trained staff-side and one trained management-side representative
- ensuring the appropriate paperwork is distributed to panellists
- recording the outcome of panel decisions and notifying the relevant HR practitioner
- maintaining comprehensive records at each stage for effective evidencing of decisions, monitoring and audit purposes.

Together with Management and Staff-Side AFC Leads:

- ensuring all panel members have been accredited by the Trust and/or their trade union or professional organisation and have received job evaluation training
- ensuring all existing panel members receive refresher training as necessary
- ensuring all panel outcomes are consistent with the national job evaluation scheme which includes:
  - national profiles for the same occupational group and pay band, and
  - local matches within the same group, job family and pay structure framework across the Trust
- liaising with Care Group and line managers to ensure, wherever possible, all trained members of staff are released to participate in panels and other Agenda for Change related activities
- recommending and implementing agreed changes to procedures and systems.

### 5.7. Role of panel members

Panel members have responsibility for:
- working in partnership to evaluate jobs fairly and in accordance with the NHS Job Evaluation Handbook
- maintaining confidentiality with regard to all aspects of the work undertaken as a panel member
- participating in panels on a regular basis
- participating in job evaluation training as required
- declaring any potential conflict of interest to the panel chair.

5.8. Role of the Consistency Checking Panel
The Consistency Checking Panel is responsible for:

- working in partnership to provide quality assurance for every job description matched to a national profile
- highlighting any concerns regarding consistency of outcomes against other similar posts
- providing advice/recommendations to the AFC administrator where apparent inconsistencies are identified
- the consideration and formal agreement of job descriptions submitted for benchmarking.

6. Standards and Practice

6.1. New roles
The Trust holds a wide range of job descriptions that have been formally banded by trained matching panellists. Where possible, new and changed roles should be based on one of these existing job descriptions and managers should, therefore, always contact their HR practitioner before writing another.

6.2. Vacant posts

6.2.1. Whenever a vacancy arises the recruiting manager has the opportunity to review the duties and responsibilities of the post. Before requesting approval to recruit, therefore, the manager should consider such things as:

- whether the vacancy needs to be filled or can the duties be adjusted or allocated to someone else recognising that this may result in a possible re-banding of the other post
- will future changes require the new post-holder to have different skills?

6.2.2. If, following this review, it is decided that no changes to the job description are required then the manager should arrange for the post to be advertised.

6.2.3. If the recruiting manager identifies the need for a slightly different role they should first discuss the changes with their HR practitioner. If these do not include a significant or tangible change to the knowledge and skills required to perform the role and/or the post-holder’s freedom to act/accountability then the manager may continue with the recruiting process.
6.2.4. Where the changes to the job description and person specification are considered to be significant and tangible (see section 6.4.2.), the HR practitioner should contact the AFC administrator to ascertain whether any similar matched job descriptions already exist.

6.2.5. The recruiting manager should then write the job description and person specification: where possible, basing the contents on the existing banded job description provided by the AFC administrator. Managers are advised to invest sufficient time at this stage to accurately describe the role and responsibilities of the post-holder to ensure the final banding is appropriate and consistent with similar roles within the Trust.

6.2.6. The JD should then be submitted to the HR practitioner who will consider the suitability of using the existing role as a benchmark (see Section 6.3). This is likely if the post holder would be performing a job where the same national profile applies, eg the job description for a new specialist nurse might be benchmarked against a specialist nurse role that already exists.

6.2.7. If considered appropriate, a copy of the new and existing job description should be submitted to the AFC administrator who will arrange for the roles to be formally benchmarked.

6.2.8. If the job description is successfully benchmarked then the manager may continue with the recruiting process.

6.2.9. Job descriptions that cannot be benchmarked must be submitted to a full Agenda for Change job matching panel (see Section 6.5).

6.3. Benchmarking

6.3.1. A wide range of job descriptions, formally banded by trained panellists, already exist. Recruiting managers should, therefore, in conjunction with their HR practitioner, consider whether a new job description might be suitable for benchmarking.

6.3.2. When requested, the AFC administrator will identify one or more suitable job descriptions that have already been formally banded by a trained matching panel.

6.3.3. The job description will be considered as suitable for benchmarking if:

- the new post-holder would be performing a job where the same national profile applies, eg a new specialist nurse might be benchmarked against a specialist nurse role that already exists, and

- the new post-holder’s freedom to act, together with the knowledge, skills and experience (detailed as essential in the person specification) are considered to be at an equivalent level to the role that already exists.

6.3.4. Benchmarking will be undertaken in partnership with Staff-Side and any bandings agreed by this method will be formally approved by the Consistency Checking panel.
6.3.5. A detailed record of the result will be retained by the AFC administrator.

6.4. Changed jobs
6.4.1. Managers should routinely discuss the job description of their staff members during their annual appraisal to ensure they remain fit for purpose.

6.4.2. While all posts are likely to change subtly over time and job descriptions need to be updated to reflect these changes, only significant and tangible changes to the job description and person specification are likely to increase the post-holder’s pay band, such as:

- a significant increase in responsibilities
- the requirement for additional formal training/qualifications
- a change in the level of initiative/supervision required.

(It should be noted that an increase in volume of work alone does not necessitate a banding review but may indicate the need for additional resource.)

6.4.3. If an individual considers this to be the case, they should discuss the changes with their line manager and agree a revised job description. The manager must have clear grounds to believe that the changes are significant and tangible. If in doubt, advice should be sought from their HR practitioner.

6.4.4. All requests for re-banding must have the support of the Care Group General Manager and Head of Service and, in the case of Bands 8a and above, approval of the relevant Executive Director.

6.4.5. In addition, consideration must be given to other members of staff ensuring that any re-banding is undertaken in a fair and equitable manner with all staff members having access to opportunities for advancement.

6.4.6. When submitting the post for job matching the manager must specify/highlight the changes made to the job description and person specification.

6.5. The job matching process
6.5.1. Job descriptions in the following categories must be submitted to an Agenda for Change job matching panel:

- new roles that cannot be benchmarked against existing posts
- requests for re-banding by an existing post-holder
- senior roles of Band 8a and above except where the role clearly sits within a national profile as in the case, for example, of some healthcare professions and with the agreement of their professional clinical lead.

6.5.2. The manager completes a Request for Job Matching form (available from their HR practitioner) and arranges for it to be countersigned by their Care Group General Manager, Head of Service and, in the case of re-banding Bands 8a and above, relevant Executive Director.
6.5.3. The manager forwards the authorised Request for Job Matching form, job description and person specification for evaluation to their HR practitioner.

6.5.4. The HR Business Partner team practitioner ensures completion of the paperwork is in line with the procedure before passing the documentation to the AFC administrator who will log the request on the departmental database for job evaluation.

6.5.5. The HR practitioner confirms the panel date to the manager and ensures the availability of the line manager and/or, in the case of a request for re-banding, individual member of staff.

6.5.6. The matching panel meets and evaluates the post against a national profile. The panel chair should contact the designated panel contact for any clarification and/or additional information that may be required. The panel chair will record the questions asked and answers received for consideration by the matching panel.

6.5.7. The outcome of the job evaluation is consistency checked and the relevant HR practitioner advised of the banding outcome as well as any recommendations made by the consistency checking panel.

6.5.8. The HR practitioner will advise the Care Group General Manager/Head of Service of the banding outcome, which should be cascaded through the appropriate management structure, and liaise with the line manager with regard to any changes required to the job description as recommended by the consistency checking panel.

6.5.9. In the case of an application for re-banding, the line manager will advise the post holder(s) of the panel outcome in writing and complete a contract amendment form (CAF) for authorisation and submission to Payroll.

6.5.10. Any change of banding will be effective from either the date of appointment, in the case of new jobs, or the date when the new role becomes effective as agreed by the appropriate line manager and post holder and endorsed by the Executive Director, Care Group General Manager or Head of Service.

6.5.11. Where changes to a job description produce a reduced banding as a result of organisational change, the post holder may be entitled to pay protection in accordance with the Trust’s Pay Protection Policy available from the Trust’s document library.

6.6. Unique posts

6.6.1. Most job descriptions will match to a national profile. However, there may be very limited and exceptional circumstances where a post is so unique that the post holder may be required to complete a job analysis questionnaire (JAQ).
6.6.2. The final signed version of the JAQ will be submitted to panel for evaluation. Post-holders are not required to be present during the evaluation process as the JAQ form will contain all the relevant information.

6.6.3. The total points scored for the post will determine the pay band.

6.7. **Time scales**

6.7.1. Job descriptions, which have been confirmed as fit for purpose by HR practitioners, will be presented for review by the next available panel (normally within six weeks of receipt).

6.7.2. The outcome will then need to be confirmed by the consistency checking panel.

6.7.3. At times of increased activity, eg during periods of organisational change, the AFC administrator will liaise with the HR practitioners to determine priorities (within Care Groups and across the Trust) and, where appropriate, make efforts to arrange additional panels to meet the increased demand. In these circumstances the six-week review period will, inevitably, need to be extended.

6.8. **Use of external job matching panels**

6.8.1. The Trust is committed to using and maintaining the skills of its staff trained in the job matching process. Nevertheless, there may be times when demand is such that the Trust engages the services of a third-party for which the Care Group/Service will be charged.

6.8.2. In all cases, the outcome will be checked by the Trust’s own consistency checking panel to ensure parity with existing organisational structures.

6.8.3. For further details regarding this process, managers are advised to contact their HR practitioner.

6.9. **Consistency checking**

6.9.1. Every job description matched to a national profile is subject to quality assurance by a consistency checking panel consisting of staff-side and management representatives.

6.9.2. Completed matching forms will be checked to ensure:

- all factors are recorded and evidenced correctly,
- scores are correctly totalled,
- outcome is correctly identified,
- paperwork is signed and dated,
- the chosen national profile is appropriate.

6.9.3. In addition, the consistency checking panel will check the outcome against other similar posts (job family, occupational group and pay band) within the Trust.
6.9.4. The consistency checking panel will confirm the outcome on the consistency checking record.

6.9.5. Any apparent inconsistencies in matching should be referred back to the AFC administrator. Subject to the advice and recommendation of the consistency panel, the AFC administrator will refer any queries to the chair of the matching panel or appropriate HR practitioner. This may result in the job being re-evaluated by a different panel.

6.9.6. Only when consistency checking is complete and any apparent inconsistencies resolved, will the banding outcome be issued to the Executive Director, Care Group General Manager or Head of Service normally within five calendar days after consistency checking has been undertaken.

6.9.7. The line manager should subsequently confirm the outcome in writing to the member of staff within three calendar days.

6.10. Appeal of banding review outcome

6.10.1. If, despite following the process described in Section 6.4, a post-holder is dissatisfied with the banding outcome, they may request a review.

6.10.2. The manager should arrange to meet with the post-holder on an informal basis together with an HR practitioner or other member of staff trained in job matching and able to explain the process. If the post-holder wishes, their Staff-Side representative may also be in attendance.

6.10.3. Copies of the job description, matched job report and national profile used by the job matching panel will be available for discussion.

6.10.4. A better understanding of the outcome may lead the post-holder to either accept the banding decision or recognise the reason for the decision and what information may be required by the panel should they wish to make a formal request for the banding to be reviewed.

6.10.5. If the latter, the post holder should submit their appeal in writing to their line manager within 14 calendar days of the informal meeting. The grounds for the appeal, including the details of where they disagree with the match and supporting evidence, should be clearly stated.

6.10.6. The line manager will contact the post-holder to acknowledge receipt and confirming that the documentation has been passed to the appropriate HR practitioner. All parties should be kept fully briefed on the arrangements for the review panel.

6.10.7. Where operationally possible, the job will be submitted to a further review panel constituted of a majority of different members from that of the original panel.

6.10.8. The review panel will carry out a fresh and full match of all factors taking into consideration the additional evidence. The review panel can:

- confirm the same match
- confirm a match to a different profile and/or band (higher or lower)
• in very exceptional circumstances, consider the use of the hybrid matching procedure or refer the job for local evaluation via a job analysis questionnaire (JAQ).

6.10.9. Following successful consistency checking, the Executive Director, Care Group General Manager or Head of Service will be advised of the review panel outcome normally within five calendar days after consistency checking has been undertaken. The line manager should subsequently confirm the outcome in writing to the member of staff within three calendar days.

6.10.10. There is no further right of appeal in respect of the banding outcome.

6.10.11. Any complaint that the appeal process has not been fairly applied should be addressed using the Trust’s Grievance and Disputes Policy and Procedure.

6.11. **Confidentiality**

6.11.1. The job matching process is a confidential process at the Trust.

6.11.2. Personal details of job holders are not disclosed to panel members. Similarly, the names of panel members are not disclosed without their consent to anyone, other than staff within the Human Resources Department, in order to protect them from any attempts to introduce factors into the process that could lead to bias. When asking questions of the designated panel contact, the chairman of the panel should stress that this is “in confidence” in order to retain his/her anonymity.

6.11.3. Panel members must not disclose any information relating to job matching. All discussions within the panel must remain confidential. If any panel member breaches confidentiality, their role in job matching will be terminated and they may be subject to investigation and action under the Trust’s Disciplinary Policy and Procedure.

7. **Dissemination and Implementation**

7.1. A copy of the policy will be stored electronically on the Trust’s document library (Human Resources folder).

7.2. A communication will be sent to HR practitioners to enable them to support the implementation of the policy.

7.3. A copy of the policy will be circulated to all trained panellists.

7.4. Training: all members of job evaluation panels will be appropriately trained and supported to ensure the integrity of the scheme is maintained.

8. **Monitoring compliance and effectiveness**

<table>
<thead>
<tr>
<th>Element to be monitored</th>
<th>Number of applications received for evaluation.</th>
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<tbody>
<tr>
<td></td>
<td>Appeal requests raised by post-holders.</td>
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<tr>
<td></td>
<td>Grievances raised by post-holders.</td>
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<td>Lead</td>
<td>Director of People and Organisational Development</td>
</tr>
</tbody>
</table>

Job Matching Policy V2.0
### Tool Reports generated from:
- Job matching database
- Employee Relations case log.

### Frequency
- **Anually**

| Reporting arrangements | POD will receive a report on the analysis of the elements to be monitored on an annual basis. This information will subsequently be reported to the Joint Consultative Negotiating Committee (JCNC).
| The overall effectiveness of the policy will be considered and any remedial actions identified will be recorded in the relevant meeting notes or minutes.

| Acting on recommendations and Lead(s) | The Head of Employee Relations will ensure any subsequent recommendations are undertaken.

| Change in practice and lessons to be shared | Any policy/system improvements will be actioned in partnership with Staff-Side within six months.

### 9. Updating and Review

9.1. This policy will be reviewed every three years or earlier in view of any developments which may include legislative changes, national policy instruction (NHS or Department of Health), a Trust Board decision, or request by either party.

9.2. Where the revisions are minor, e.g., amended job titles or changes in the organisational structure, authorisation will be sought from the Executive Director responsible for signatory approval and the policy re-published accordingly without having gone through the full consultation and ratification process.

### 10. Equality and Diversity

10.1. The Royal Cornwall Hospitals NHS Trust is committed to a policy of equal opportunities in employment. The aim of this policy is to ensure that no job applicant or employee receives less favourable treatment because of their race, colour, nationality, ethnic or national origin, or on the grounds of their age, gender, gender reassignment, marital status, domestic circumstances, disability, HIV status, sexual orientation, religion, belief, political affiliation or trade union membership, social or employment status or is disadvantaged by conditions or requirements which are not justified by the job to be done. This policy concerns all aspects of employment for existing staff and potential employees.

10.2. The Initial Equality Impact Assessment Screening Form is at Appendix 2.
## Appendix 1. Governance Information

<table>
<thead>
<tr>
<th>Document Title</th>
<th>Job Matching Policy V2.0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Issued/Approved:</td>
<td>August 2019</td>
</tr>
<tr>
<td>Date Valid From:</td>
<td>August 2019</td>
</tr>
<tr>
<td>Date Valid To:</td>
<td>August 2022</td>
</tr>
<tr>
<td>Directorate / Department responsible (author/owner):</td>
<td>Helen Strickland, HR Business Partner</td>
</tr>
<tr>
<td>Contact details:</td>
<td>01872 252649</td>
</tr>
</tbody>
</table>

**Brief summary of contents**
The policy aims to ensure that all jobs that are subject to national terms and conditions of service are evaluated in accordance with the NHS Job Evaluation Scheme and in compliance with current legislation.

**Suggested Keywords:**
Grading, banding, job evaluation, matching

**Target Audience:**
- RCHT ✔
- CFT
- KCCG

**Executive Director responsible for Policy:**
Director of People and Organisational Development

**Date revised:**
August 2019

**This document replaces (exact title of previous version):**
Agenda for Change Job Matching Policy V1.0

**Approval route (names of committees)/consultation:**
JCNC, PRG

**Senior HR Manager confirming approval processes**
Head of Employee Relations

**Signature of JCNC Chair**
{Original Copy Signed}

**Signature of Executive Director giving approval**
{Original Copy Signed}

**Publication Location (refer to Policy on Policies – Approvals and Ratification):**
- Internet & Intranet ✔
- Intranet Only

**Document Library Folder/Sub Folder**
Human Resources

**Links to key external standards**
None required

**Related Documents:**
- Disciplinary Policy and Procedure
- Equality Act 2010
- Equality, Inclusion and Human Rights Policy
- Grievance and Disputes Policy and
Procedure
- NHS Job Evaluation Handbook
- NHS Terms and Conditions of Service Handbook
- Fixed Term (Prevention of Less Favourable Treatment) Regulations (2001)
- Organisational Change Policy
- Pay Protection Policy

Training Need Identified? Yes – for panellists

Version Control Table

<table>
<thead>
<tr>
<th>Date</th>
<th>Version No</th>
<th>Summary of Changes</th>
<th>Changes Made by (Name and Job Title)</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 2013</td>
<td>V1.0</td>
<td>Initial Issue</td>
<td>Helen Strickland, HR Business Partner</td>
</tr>
</tbody>
</table>
| August 2019 | V2.0   | Re-formatted in line with current Trust format and full review resulting in minor policy amendments including:  
  - addition of summary flow-chart  
  - addition of reference to GDPR  
  - reference to hybrid matching removed  
  - addition of reference to use of external job matching panels (Section 6.8)  
  - process for appeal of banding review outcome clarified (Section 6.10) | Helen Strickland, HR Business Partner/ Kevin Bolt, Payments and Contracts Manager/ AFC Staff-Side Lead |

All or part of this document can be released under the Freedom of Information Act 2000

This document is to be retained for 10 years from the date of expiry.

This document is only valid on the day of printing

Controlled Document

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### Appendix 2. Initial Equality Impact Assessment Form

<table>
<thead>
<tr>
<th>Name of the strategy / policy / proposal / service function to be assessed</th>
<th>Job Matching Policy V2.0</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Directorate and service area:</strong></td>
<td>Human Resources</td>
</tr>
<tr>
<td><strong>New or existing document:</strong></td>
<td>Existing</td>
</tr>
<tr>
<td><strong>Name of individual completing assessment:</strong></td>
<td>Helen Strickland</td>
</tr>
<tr>
<td><strong>Telephone:</strong></td>
<td>01872 252649</td>
</tr>
</tbody>
</table>

1. **Policy Aim**

   *Who is the strategy / policy / proposal / service function aimed at?*

   The policy aims to ensure that all jobs, subject to national (formerly Agenda for Change) terms and conditions of service are evaluated in compliance with current legislation and in accordance with the NHS Job Evaluation Scheme.

2. **Policy Objectives**

   An equitable and robust pay structure through the application of a fair, consistent and transparent comprehensive job evaluation system.

3. **Policy – intended Outcomes**

   Equal pay for equal work.

4. **How will you measure the outcome?**

   Please see Section 8, Monitoring.

5. **Who is intended to benefit from the policy?**

   Members of staff, the Trust.

6a **Who did you consult with**

<table>
<thead>
<tr>
<th>Workforce</th>
<th>Patients</th>
<th>Local groups</th>
<th>External organisations</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   b. Please identify the groups who have been consulted about this procedure.

   JCNC

What was the outcome of the consultation?  

No concerns identified.
7. The Impact
Please complete the following table. If you are unsure/don’t know if there is a negative impact you need to repeat the consultation step.

Are there concerns that the policy **could** have differential impact on:

<table>
<thead>
<tr>
<th>Equality Strands:</th>
<th>Yes</th>
<th>No</th>
<th>Unsure</th>
<th>Rationale for Assessment / Existing Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Sex</strong> (male, female, trans-gender / gender reassignment)</td>
<td>✓</td>
<td></td>
<td></td>
<td>The policy supports the Trust’s commitment of providing equal pay for equal work. (See Section 1.2.)</td>
</tr>
<tr>
<td><strong>Race / Ethnic communities /groups</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Disability</strong> - Learning disability, physical impairment, sensory impairment, mental health conditions and some long term health conditions.</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Religion / other beliefs</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td><strong>Marriage and Civil partnership</strong></td>
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<tr>
<td><strong>Pregnancy and maternity</strong></td>
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<td></td>
</tr>
<tr>
<td><strong>Sexual Orientation, Bisexual, Gay, heterosexual, Lesbian</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You will need to continue to a full Equality Impact Assessment if the following have been highlighted:

- You have ticked “Yes” in any column above and
- No consultation or evidence of there being consultation- this excludes any policies which have been identified as not requiring consultation. or
- Major this relates to service redesign or development

8. Please indicate if a full equality analysis is recommended. | Yes | No | ✓ |
9. If you are not recommending a Full Impact assessment please explain why.

Not indicated.
A summary of the results will be published on the Trust’s web site.