



Job Evaluation Policy and Procedure

Fforwm Partneriaeth Cymru
Welsh Partnership Forum

GIG Cymru yn
Gweithio mewn Partneriaeth

NHS Wales
Working in Partnership



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Section 1

Policy scope, principles and benefits

1. Introduction

This policy has been developed in line with the nationally agreed NHS Job Evaluation Scheme

Introduced in 2004, the scheme is used to determine the pay bands for all staff on AfC contracts and relies on consistent application within organisations and across the service. The scheme is based on fairness and equality in line with equal pay legislation and is a continuing requirement as organisations develop new services and roles and incorporate the job evaluation process into procedures, particularly, but not exclusively, organisational change and service improvement.

The Job Evaluation Handbook contains guidance on interpreting and applying the AfC JE scheme and National Job Profiles, which have been developed nationally and approved by the executive on behalf of Staff Council.

This policy and procedure will set out the requirements for fulfilling the scheme across Wales to ensure a consistent approach across organisations.

2. Policy statement

NHS Wales is committed to the fair and consistent application of the Agenda for Change (AfC) NHS job evaluation scheme (JE) both at national and local organisation level.

This is in line with the commitment of employers, trades union representatives and Welsh Government to work in partnership to maintain a fair and consistent NHS pay system which supports NHS Service modernisation and delivery and meets the reasonable career aspirations of staff.

3. Scope

This policy applies to all staff employed under Agenda for Change terms and conditions of service

4. Principles

The aim of this policy is to ensure that all NHS Wales organisations are consistent in their application of the national job evaluation scheme. In addition, the policy sets out the process for approval and application of NHS Wales Job Descriptions where they are available and the review of these job descriptions on a three yearly cycle.

Section 2

5. Governance Arrangements

All employers in NHS Wales are required to ensure they have effective systems and arrangements in place to discharge their AfC responsibilities. They are accountable for ensuring compliance with AfC policy and the NHS Wales Job Evaluation Scheme Handbook.

Specific actions include –

- Working in partnership at a local level with an appointed Management and Staff Side Job Evaluation Lead (see annex 1). Organisations should provide facilities time to staff side leads to enable them to participate in JE lead work. This does not include sitting on panels which should be treated in the same way as management JE panel members.
- Provide suitably funded job evaluation support who can provide guidance and administration of the job evaluation processes.
- Have trained job evaluation trainers to provide training in the various job evaluation packages (see annex 2).
- Have an appropriate number of both management and staff side trained JE practitioners in matching, analysis, evaluation and consistency checking.
 - Management practitioners can be anyone who is not representing a union.
 - Staff practitioners do not need to be, accredited trade union representatives, but they should be employed by their local organisation and be nominated by and accountable to their local trade union branch and/or staff side. When sitting on panels staff side practitioners should not use facilities time but be released from their substantive role in the same way a management practitioner is.
- Ensure appropriate records and information is kept on CAJE (Computer Aided Job Evaluation System) to be able to provide
 - Local and NHS Wales monitoring and consistency checking of activity.
 - Robust notes on decisions and audit trails that would stand up in legal proceedings.

6. Job Descriptions

6.1. NHS Wales Approved National Job Descriptions

NHS Wales Job Descriptions are intended to ensure consistency in role descriptions for key roles across NHS Wales organisations. The aim of this is to facilitate movement and progression, together with ensuring equal pay for equal value within and across organisations. As these form part of National terms and Conditions, where an NHS Wales approved job description is in place, organisations must use this Job Description for relevant roles. These Job Descriptions will be subject to review on a minimum 3-year cycle to ensure they are up to date. These are available through the Wales Job Evaluation web pages <https://www.nhsconfed.org/wales/nhs-wales-employers/job-evaluation> and will be added to as NHS Wales job descriptions are developed.

6.2. Job Descriptions

An NHS Wales Job Description Template has been developed to -

- address attraction and recruitment challenges arising from overly lengthy job descriptions that didn't really identify what the job was about
- Aid in sharing approved job descriptions across Wales
- Increase the creation of NHS Wales Job descriptions

Where an NHS Wales approved Job Description is not available, the Job Description template must be used for all new job descriptions and/or when a job description is used for recruitment purposes. All AfC staff must have an up to date and agreed job description that describes the role, and the tasks required of them to carry out their job. It should not be about the individual person in the role. It is the means by which our employees understand what has to be achieved and can be used to determine criteria by which their performance

will be assessed. There is guidance on writing job descriptions in the Introduction to Job Evaluation and Writing Job Descriptions guide.

6.3. Organisation Job Descriptions

Where NHS Wales Approved Job Descriptions are not suitable for particular roles, organisations may have their own library of generic job descriptions which can be used. Again, these should be on the NHS Wales Job Description Template and should be subject to a three-year review to ensure they are still fit for purpose.

6.4. Individual Job Descriptions

It is important to remember that where there is no suitable NHS Wales or organisation job description then job descriptions for individual roles should be developed, remembering that this is for the role and not the person in the role.

6.5. Reviewing Job Descriptions to ensure they are up to date

All staff must have the duties that they undertake reviewed against their job description on an annual basis as a minimum to ensure they reflect the role to be carried out. Organisations must develop their own local process to undertake this, ensuring it is part of the PADR process and where a job description is more than 3 years old it must be reviewed in full.

Organisations must ensure that members of staff are undertaking the role detailed in their job description. Where this is not the case then organisations must –

- Allocate an appropriately banded job description for the role being undertaken which may involve a re-banding of pay
- Review the wider role in the department which may involve ensuring that the member of staff works to their current job description

It is also important to review the job description when roles are redesigned, changed as a consequence of service redesign, or a vacancy occurs. Organisations must check whether there is an appropriate NHS Wales approved or local job description to fit the role before developing a new job description.

Depending on the level of change to role the following options would be available –

- Identify if there is an NHS Wales Job Description that better matches the role required and the duties being undertaken
- Agree no changes to the job description - no further action
- Agree changes to the job description. The job evaluation team must be consulted to assess the job description in partnership. The outcome will be -
 - Advice that the changes have no effect on the current pay band.
 - Advice that a re-evaluation of pay band is required.

Organisations should have clear processes on how changes to roles will be identified and verified. Any changes must go through the job evaluation process to ensure robust and auditable outcomes

Where job descriptions cannot be agreed there must be an attempt to reach agreement using an early resolution approach. If an agreement cannot be reached and there is no resolution, then employees can choose to use the Wales Respect and Resolution policy.

6.6. Re-evaluation of Changed Jobs (Re-evaluation of Pay Band)

Where it is agreed that the demands of the post have changed significantly, a re-evaluation of the post needs to be carried out which should assess the whole job.

The result could be being allocated a NHS Wales Job Description or when none exists by submitting a new agreed job description which details the skills and responsibilities applicable to the post.

If the banding outcome changes as a result of re-evaluation, that change should be backdated to when the postholder and manager agree that the job had changed. This could vary depending on how long the member of staff has been carrying out the duties or the time it has taken to develop and match the new job description. This date should be agreed before the re-evaluation takes place.

Disputes about back-dating should be resolved through local procedures.

7. Job Evaluation Process

In order to assign an appropriate pay band to a job description it must go through the job evaluation process. The full process for both job matching, job evaluation and consistency checking is available in the NHS Job Evaluation Scheme Handbook. Procedures should be consistent across Wales for ease of monitoring (see annex 3).

8. New and Updated National Job Profiles

From time-to-time new national job profiles are developed or current ones updated via requests from employers and trade unions. Employers will want to prepare for this in advance by ensuring that job descriptions are up to date, and staff are undertaking the duties against the job description. Organisations will need to ensure they have sufficient job evaluation capacity to handle an increase in activity when this occurs.

9. Further Advice

The full process for both job matching, job evaluation and consistency checking is available in the NHS Job Evaluation Scheme Handbook.

Further advice can be sought from your local Job Evaluation Leads the NHS Wales Job Evaluation Lead and if required this can be escalated up to the UK Job Evaluation Group (JEG).

Annex 1

Outline for Organisation Job Evaluation Scheme Leads

The benefit to the organisation of appointing JE Leads is to ensure the organisation is applying the Job Evaluation Scheme in line with that nationally agreed, which will ensure roles are appropriately banded and the graded scheme is consistently applied.

The role of the Job Evaluation Leads (JE Leads) is to support the organisation to maintain specialist detailed knowledge of the NHS Job Evaluation Scheme and processes. They will be experienced JE practitioners, with one representing management and one representing, and appointed by, a recognised trade unions/staff side in the organisation.

Partnership working is an essential requisite of the JE Scheme, and it is essential that the organisation has a partnership pair of job evaluation leads, together they share the responsibility and ownership of the JE processes and how they operate within the organisation, supports the transparency and integrity of the process.

Working in Partnership the JE Leads have a joint responsibility to

- Ensure that nationally agreed good practice guidelines contained in the NHS Job Evaluation Handbook and supplementary guidance sent out by the NHS Staff Council are integrated into the organisation's job evaluation policies and practices.
- Keep up to date on NHS Job Evaluation developments and share recommended practice locally, keeping Job Evaluation practices up to date and relevant to the organisation.
- Work with management and staff side to ensure that Job Evaluation Policies and Procedures are monitored and reviewed in partnership.
- Provide advice and guidance to employees, managers, and accredited staff representatives about good practice in job evaluation process, on all aspects of the scheme and the interpretation of the organisations JE policies. For example, the evaluation of new and changed jobs.
- To ensure that there are adequate numbers of trained job matchers and evaluators to meet the demands of the organisation including keeping an up-to-date register of trained matchers and evaluators.
- Alert the organisation to any failures in process or operation of the JE process which may expose the organisation to equal pay challenges.
- Keep an overview on the management and storage of documentation involved in job evaluation so that a clear audit trail is maintained in the recording of panel decisions and JE processes.
- Have an awareness of the national Job Evaluation Group (JEG) and provide a link to the national group in terms of seeking their technical advice and guidance where required.

Technical competence

- Trained in all aspects of the NHS Job Evaluation Scheme including Job Matching, Job Evaluation and Job Analyst and Consistency checking
- Be the technical experts and advise the organisation on the application of the Scheme

- Understanding of equal pay legislation
- Ability to implement and ongoing maintenance of the JES within organisation
- Working knowledge of CAJE or other similar electronic system for storage and audit of outcomes.
- Keep their own technical knowledge up to date by undertaking refresher training as required and accessing NHS Employers websites for up-dates on profiles etc.

Behavioural competence

- A commitment to working in partnership and ensuring this is embedded within the organisation's JE Scheme processes
- A commitment and ability to challenge poor practice in order to ensure the credibility and governance of the scheme is maintained.
- Resilience
- Ability to influence others
- Ability to mediate and build consensus when opinions differ
- Ability to work as part of a Team, build local capacity for panels and ensure succession planning
- Ability to maintain confidentiality and to convey the importance of this to those involved in the scheme.

Skills

- High level attention to detail
- Ability to analyse a large amount of information and draw conclusions from the data.

Support for JE Leads

It is important that JE Leads are given the necessary support and resources to enable them to undertake their roles effectively. This may include, but is not limited to, access to computer systems, administration support, finance to support the individual practitioners training and panel members training.

Annex 2

Job Evaluation Training

Organisations need to ensure that staff are trained in the matching, analysis, evaluation and consistency checking processes of the NHS JE Scheme for continuity

Every job evaluation practitioner is required be up to date on current practices, before they take part in local panels/processes.

It is essential that organisations keep a register of names of practitioners and trainers.

JEG has developed a number of courses that cover the full scope of the NHS Job Evaluation Scheme. All courses should be completed in order, as the second, third and fourth courses require attendees to have a level of experience in NHS job evaluation. This training is endorsed by the NHS Staff Council.

In Wales, we have our own trained trainers delivering the JEG courses at a local and national level. There are no costs to organisation other than the release of time for the trainers and the provision of training materials. Each organisation should have its own JE trainers in partnership who will provide training in their own organisation and also assist in training across Wales where needed. By using shared trainers across Wales, it enables training to be provided free of charge.

The following JEG accredited courses are available and can be delivered face-to-face and virtually.

Stage 1 - Job Matching Course (2 days)

A course for new and inexperienced members of staff in job evaluation.

Job matching is the main method of undertaking job evaluation (JE) within the NHS.

All practitioners that sit on matching panels should be trained to ensure they understand the scheme and the methodology it uses. As all JE work should be completed in partnership, we try to run this course with equal numbers of management and staff-side representation.

Stage 2 - Consistency Checking Course (1 day)

This is a course for those who have already completed the job matching course, with a good understanding of job evaluation and a desire to undertake consistency checking in their organisation.

All job evaluation outcomes must go through consistency checking. This work is often undertaken by the two job evaluation leads, or alternatively, an experienced partnership pair who are up to date in JE practices.

Stage 3: Job analysis and Job evaluation (2 days)

This course is designed for experienced job matchers who will have some understanding of how to assign values across the 16 factors.

On the rare occasion that a role is so specialised and unique that it cannot be matched to a national job profile, it must be fully evaluated. This requires analysis and evaluation by trained practitioners of the job analysis questionnaire that is agreed by the post holder and/or line manager. Most roles match to profiles, so an organisation would not need to train all practitioners in analysis and evaluation, but a select few, experienced practitioners.

Stage 4: Refresher training (1 day)

This is a condensed course to be completed by job evaluation practitioners who may need a refresher to remain up to date with job evaluation practices.

WALES JOB EVALUATION UNIT COURSES

CAJE Administrators Course (1/2 Day)

This course is for those who are responsible for the administration of the Computer Aided Job Evaluation (CAJE) system. All new administrators must attend this course to ensure consistency and good practice across Wales. Having a standard approach to using the system enables organisations to undertake local consistency checks and have a good auditable trail for all job evaluation outcomes.

Train the Trainer (1 day)

This course is for experienced JE practitioners to provide JE training in their own organisation and across Wales.

Delegates must have completed the full 2-day job matching training and be experienced in panel work. To deliver the job analysis job evaluation training they must have also completed this course themselves.

Delegates can be either management or staff side job matching practitioners and should be confident in delivering training to an audience and have an engaging interactive aptitude to support all learning types

Annex 3

Job Evaluation Process

In order to assign an appropriate pay band to a job description it must go through the job evaluation process.

This should be carried out using the Computer Aided Job Evaluation (CAJE) web-based system. Members of the job evaluation team must be trained to use the system to ensure consistency across Wales and have their own login details. Job descriptions should be numbered with the agreed Wales code which enables organisations and Wales monitoring to easily identify roles. All new job descriptions and re-evaluation of pay bands should be entered onto CAJE as a new job with a new job match reference code e.g. 2024/0012

The following has been taken from the NHS Job Evaluation Scheme where you can find the full processes.

Job Matching

Job matching is an analytical way of evaluating as many different jobs as possible to nationally evaluated profiles in the most efficient and consistent manner possible. Job matching avoids the need for many local evaluations

- Job matching is carried out by a panel of between three and five representatives comprising both management and staff side, who must have been trained as job matchers in the NHS Job Evaluation Scheme. The majority of roles are expected to match to a national profile.
- Once matched it must be checked for both quality and consistency by two trained JE practitioners in partnership.
- The outcome, including a copy of the matched job report, should be sent to the relevant manager following the local processes and procedures in place. Where there is a job holder in the role the outcome must also be notified to the member(s) of staff, including a copy of the matched job report, details of the proposed pay banding and what to do in case of disagreement.

Job Evaluation

Local evaluation is much more detailed and thorough than job matching, so it is important to be sure that a local evaluation is necessary before starting the process.

A job will need to be evaluated, where an attempt has been made to match them to one or more national profiles, but this has not proved possible, for example unusual and/or very specialist clinical and non-clinical NHS roles or jobs going through role re-design.

- As part of the full job evaluation process the member of staff (where there is one) and manager complete a job analysis questionnaire (JAQ) which is analysed by two representatives comprising both management and staff side, who must have been trained as job analysts in the NHS Job Evaluation Scheme.

- Once the JAQ has been agreed the job evaluation is carried out by a panel of between three and five representatives comprising both management and staff side, who must have been trained as job evaluators in the NHS Job Evaluation.
- Once evaluated it must be checked for both quality and consistency by two trained JE practitioners in partnership.
- The outcome, including a copy of the evaluation job report, should be sent to the relevant manager following the local processes and procedures in place. Where there is a job holder in the role the outcome must also be notified to the member of staff, including a copy of the evaluation job report, details of the proposed pay banding and what to do in case of disagreement.

Review Process

In the event that groups of staff or individuals are dissatisfied with the result of matching or evaluating they may request a review which must be submitted within three months of notification of the original panel's decision.

All reviews must be entered onto CAJE using the original job match reference code and adding an 'R' to the end of the job match reference to indicate it is a review e.g. 2024/0012R

- In order to trigger a review, the jobholder(s) must provide details in writing of where they disagree with the match or evaluation and evidence to support their case. It is good practice for organisations to have a review evidence form listing the factors for the jobholder(s) to complete. Jobholders only need to provide information on the factors where they disagree.
- The review must be carried out in partnership by a panel of between three and five representatives comprising both management and staff side, the majority of whom should be different from the original panel.
- A review panel will –
 - Confirm the same match / evaluation outcome.
 - Confirm a match to a different profile or make a different evaluation. The band can go up or down.
 - Possibility of referring the job for full evaluation (JAQ).

Once the full job evaluation process has been completed the job holder has no right of appeal beyond the review panel if their complaint is about the banding outcome. However, in the event that the jobholder can demonstrate that the process was misapplied they may use the All-Wales Respect and Resolution policy. Where this is upheld, a possible remedy may be to use a new panel or escalate to the Wales Job Evaluation Lead who can arrange for a new panel outside of the organisation.

NHS Wales Approved/ Shared Job Descriptions

NHS Wales Approved Job Descriptions do not need to and should not be taken through organisational job evaluation processes.

However, there are occasions where organisations may want to use a job description that hasn't been through their own job evaluation process. For example: There is a job description available that has been through the evaluation process in another NHS Wales organisation and has been agreed for sharing at All-Wales level.

Jobs that have been approved for wider sharing must be uploaded to your own CAJE account and advice has been produced by the NHS Job Evaluation Group (JEG) to support employers when using a job description that has been developed and banded by another organisation. In all these situations the employer must ensure that:

- They are satisfied and can prove that the job matches to a national profile or evaluates at the stated band **AND**
- The outcome is consistent with other jobs within that employer **AND**
- They have an audit trail demonstrating that the pay band can be justified.

Wales has an agreed process for sharing of job descriptions which have been banded by other NHS organisations in Wales (see annex 4). It is important to remember that when adding a Wales or Shared job description to your CAJE account you use the same job match reference to allow for the monitoring of use.

Updating Job Descriptions

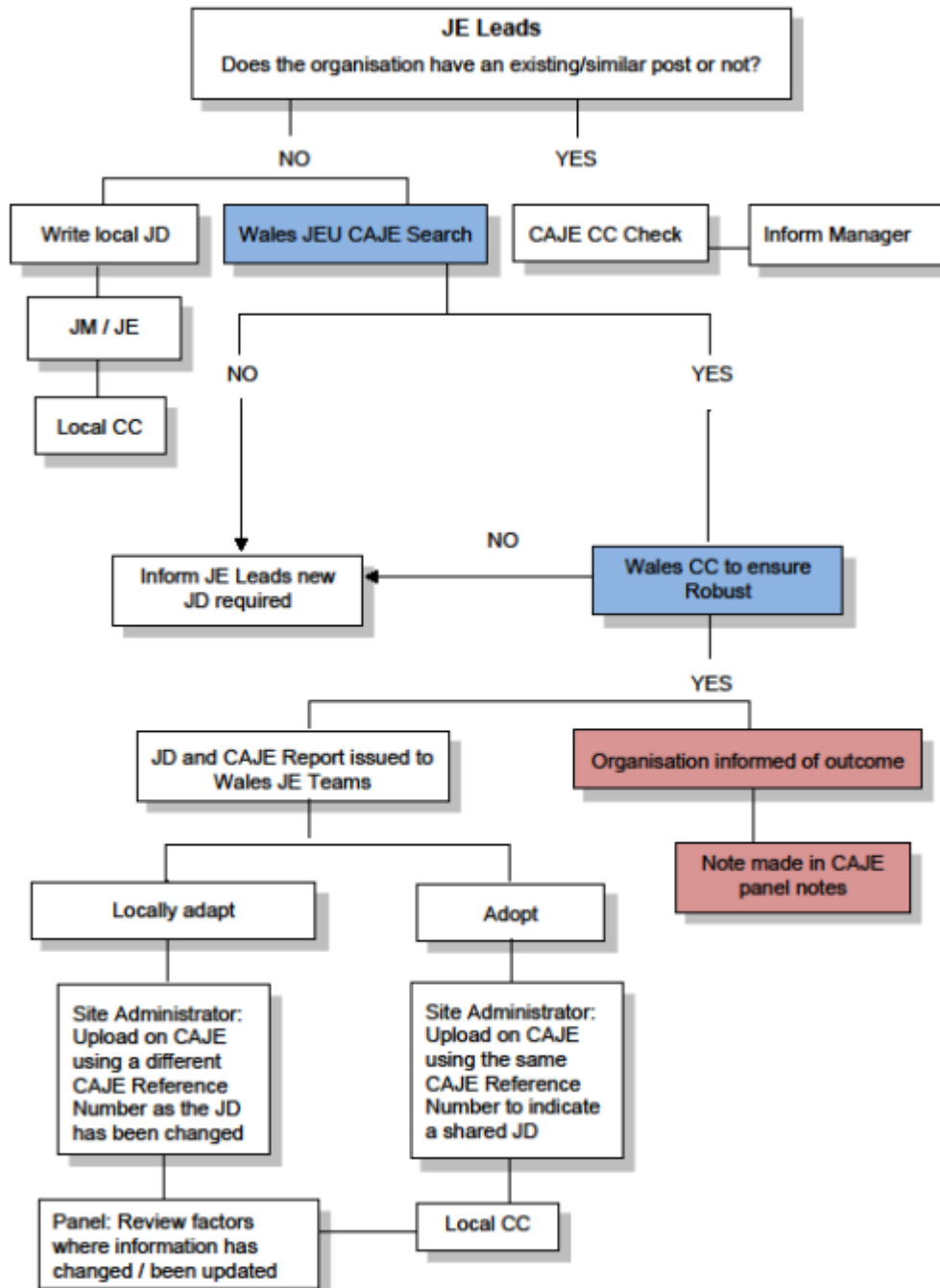
A substantial amount of job evaluation work involves updating/amending job descriptions that have already been matched/evaluated or using a pre-banded job description to develop a new one i.e. basing the job description on one that already has a band outcome.

These must be assessed by the job evaluation team in partnership to see if the changes impact upon the pay band.

The process for dealing with these types of updated/amended jobs can be found in Annex 5.

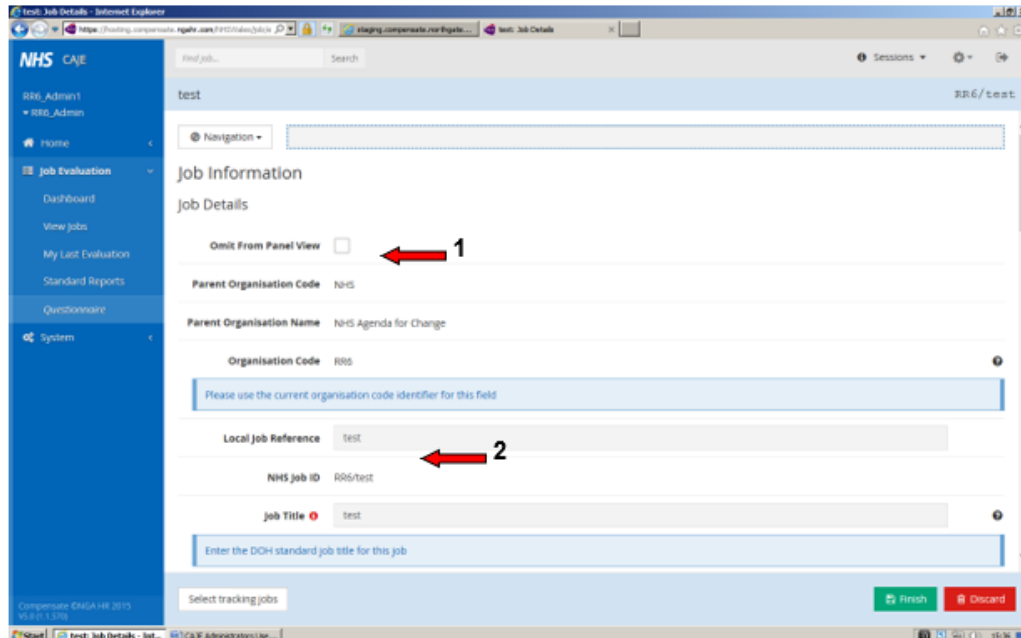
Annex 4

Wales Process for Sharing of Job Descriptions

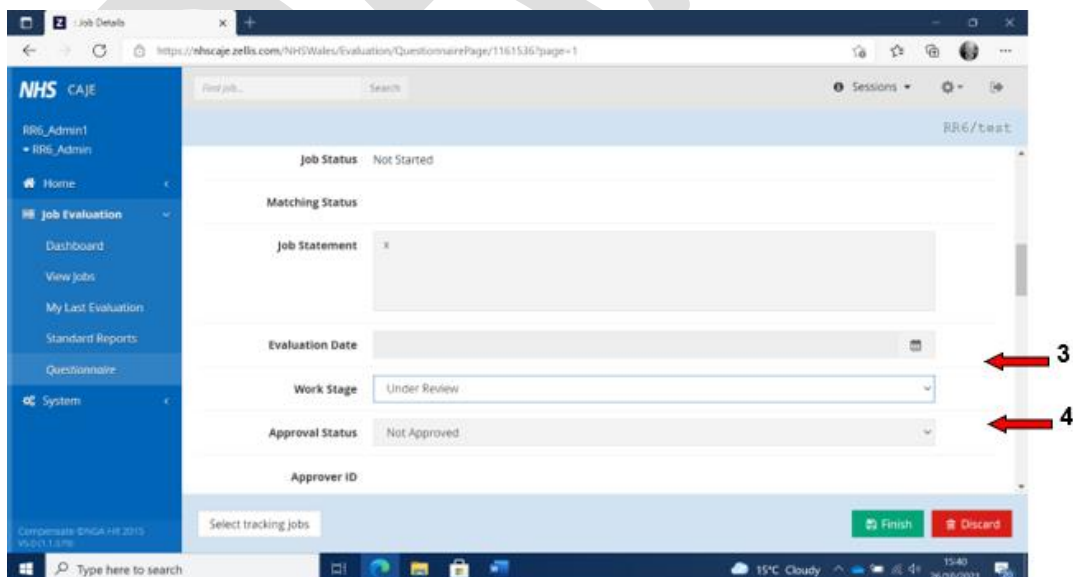


Adopting the JD Like for Like

In CAJE add a New Evaluation and complete the Job Details page as you would usually when adding a job but remembering the following:



- 1 Click in the 'Omit from Panel View' box.
- 2 Add in the same CAJE reference - Please use the same reference code when adding to CAJE. This helps identify it as a shared JD. (Your Org Code will automatically be added by CAJE)

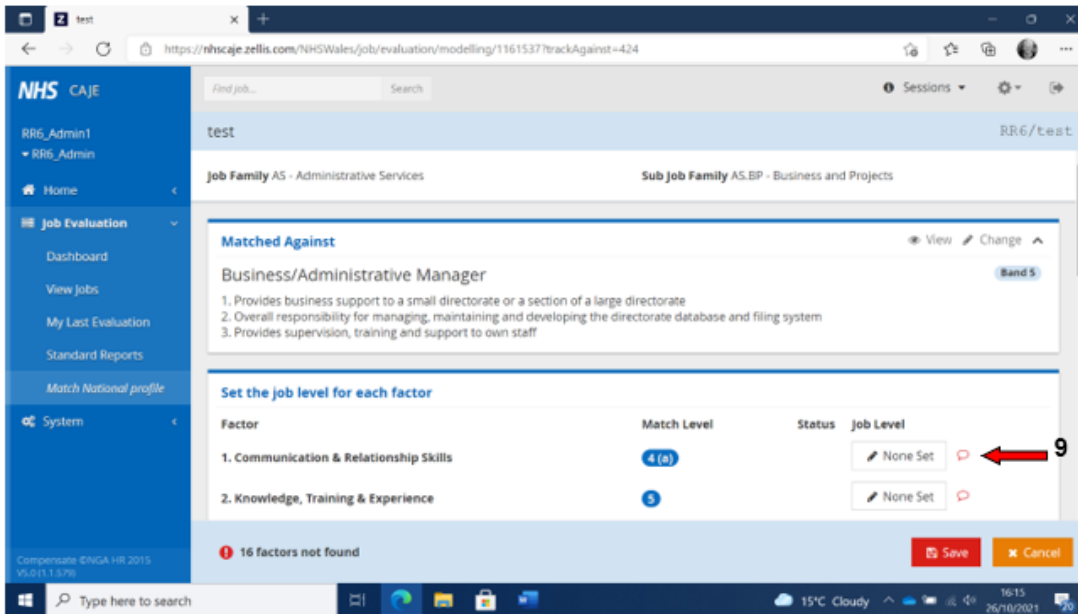


- 3 The evaluation date should be the date job description was approved for sharing

4 Change both 'Work Stage' and 'Approval Status' to 'Approved'

The screenshot shows the 'Job Details' form in the NHS CAJE system. The form includes fields for Job Family, Sub Job Family, Service, Department, Job Panel Members (with a dropdown menu), Review Panel Members, and Panel Notes. A text area for action notes is also present. At the bottom, there is a 'Previous Grade' field, a 'Document Attachment 1' field with an 'Edit attachment' link, and a 'Select tracking jobs' dropdown. The 'Finish' and 'Discard' buttons are at the bottom right. Red arrows with numbers 5 through 8 point to the Job Panel Members dropdown, the Panel Notes field, the 'Edit attachment' link, and the 'Finish' button respectively.

- 5 Job Panel Members should be the person entering the job onto the system
- 6 Add a panel note for audit trail e.g., 'Matched by ABMUHB code RVC/2017/0093 and approved at Wales Monitoring for wider sharing' or 'Wales job description CYM/Wales/2024/0003'
- 7 Upload your JD
- 8 Finish and proceed to Profile Matching
- 9 Chose the same profile that was originally used and copy ALL the information and scores from the Job Match report into CAJE as if you were carrying out a job match and save. This is ready for partnership consistency checking against organisation data before release



Locally Adapting the JD

Follow the steps above, however as this will be looked at by a panel you will need to –

- 1 Give the JD your own CAJE reference code because you are changing the JD
- 2 Enter the panel members details
- 3 Make a note in the panel notes that the JD has been adapted e.g., 'Matched by ABMUHB code RVC/2017/0093 and adapted for local use'
- 4 The panel should review the information that has been changed or updated, all other scores should remain the same
- 5 Once completed and save you should follow through your usual local consistency checking and approval steps.

Annex 5

Wales Process for Updated/Amended Job Descriptions

In order to know how many jobs of this type are being processed and to ensure an audit trail the following process should be followed using CAJE.

This process should only be followed where updates and amendments are not significant enough to change the band. This assessment should be carried out in partnership by the job evaluation team.

All jobs that have been updated or amended should use the same job match reference code and add an 'A' to the end of the job match reference to indicate it is an amended job description e.g. 2024/0012A and a number relating to the number of times this original JD has been used.

Only original job descriptions should be used when updating but these can be used several times to create different jobs. Therefore, you may have

- 2024/0012A1
- 2024/0012A2
- 2024/0012A3.

They may or may not have the same job title. For example, Radiology Secretary 2024/0012 may become –

- Radiology Secretary 2024/0012A1
- Rheumatology Secretary 2024/0012A2
- Clinical Secretary Radiology Secretary 2024/0012A3

As an audit trail it is clear to see that job description 2024/0012 has been updated or amended but the changes were not significant enough for it to need matching.

You should not use Rheumatology Secretary 2024/0012A2 as a basis for updating or amending as this is not an original JD. You should refer the manager to Radiology Secretary 2024/0012.

The approval date on the job description should be the date it was checked.

Receive Updated/Amended Job Description

- In partnership check that the updated or amended job description does not affect the original band outcome
- Add job to CAJE by finding the original job match and using the 'Copy' function to create a new record
- You may need to update the profile in the original profile has been archived. You should make a note of this in the panel notes

CAJE Process part 1

- Click 'Omit from Panel View' as you would if you were approving a job
- Add the same job reference code adding a 'A' and the appropriate number
- Add job title
- Add the job statement of the new job
- Add today's evaluation date
- Change the 'Work Stage' and 'Approval Status' to Approved

CAJE Process part 2

- Add job panel names of partnership pair who checked the job
- In the panel notes add '-Based on XXXX/XXXX with no significant updates or amendments to change the band'
- You may also want to make a note of where a factor level would be impacted eg. new job would now be supervising, but this still doesn't change the overall band outcome
- Attach the new job description documents to the record