

JOB MATCHING PROCEDURE AGAINST NATIONAL (BENCHMARK) JOB EVALUATION PROFILES

1. AIMS

The aims of the matching procedure are:

- (1) To match as many jobs as possible to national evaluation profiles in the most efficient manner possible avoiding the need for many local evaluations.
- (2) For the matching process to be carried out by a joint team and to secure outcomes, which accurately reflect the demands of the job

2. MATCHING PANEL(S)

2.1 Matching should be carried out by a joint matching panel comprising both management and staff side members. It should be representative of the organisation as a whole. The members must have been trained in the NHS Job Evaluation scheme, which includes an understanding of the avoidance of bias. The members must also be committed to partnership working. The number of members per panel is for local agreement, but from 3 to 5 is the recommended range, with 4 being found most satisfactory by Early Implementer organisations.

2.2 It is important for reasons of consistency that a number of core members (typically 3 to 5) should between them attend as many panel meetings as possible. Records should be kept of matching panel members and representatives attending each session, together with a list of jobs matched. This is for future reference, in case of need to convene a differently constituted review panel, and to establish a matching audit trail.

2.3 In addition the panel must have available/contactable two people representing management and staff in the area of work under review. Their role will be to provide additional information about the post under consideration, generally in response to specific questions from the matching panel. These job advisers/ representatives should be briefed about the matching process.

3. DOCUMENTATION

3.1 The matching process is based primarily on agreed and up to date job descriptions for the jobs to be considered (see attached guidance note on job descriptions). The job advisers/ representatives may add local information where appropriate. It is important to ensure that all relevant documentation is before the Matching Panel. This includes the job descriptions, person specifications and organisation charts for jobs to be matched; and, where relevant, other reference documents and any short-form questionnaires used to collect supplementary information, for example, in relation to the Effort and Environment factors.

4. STEP BY STEP PROCEDURE

4.1 The JE Steering Group or its nominees in partnership will decide which posts are potentially covered by a profile. These should normally be a block of posts with duties substantially the same. There may however be some differences, including location. The posts may have different titles or current grade.

4.2 For each job, the matching panel should:

- ❑ **Identify possible profile matches**, using the (computerised or paper-based) profile index and profile titles (there are unlikely to be more than 3 possible matches).
- ❑ **Read the job description**, person specification and any other job information and the selected national profiles. Identify what appears to be the nearest profile to match first. This must be from the same occupational grouping* as the job to be matched.
- ❑ **Compare the profile job statements** with the job description, person specification and any other available information, including that provided orally by job group advisers/representatives, for the job to be matched. The available information about the job duties must be consistent with the profile job statement and from the same occupational grouping*. If this is not the case, the match should be aborted, another profile sought from the same occupational group or, if no suitable profile is available, the job sent for local evaluation. If the job duties do broadly match, complete the job statement box on the (computerised or paper-based) matching form.
- ❑ **On a factor-by-factor basis**, complete the matching form boxes with information about the job to be matched from the job description or other sources, which may include verbal information from the group advisers/representatives. Refer to the profiles for the types of information required.
- ❑ **For each factor, compare the information** on the form with that in the selected profile and determine whether they match. The information does not have to be exactly the same as that from the profile, but should be equivalent to it (e.g. 'supervises trainees' is equivalent to 'supervises students'). Even if the information on Knowledge does not appear at first sight to match, it is important to continue the matching exercise to ensure that that all information is taken into account.
- ❑ **Record** the profile level in the Profile Level column and the proposed level for the job in the Job Level column, referring to the JES factor levels only when the job information does not appear to match the profile level(s), in order to determine the appropriate level. Where the job level is the same as the profile level or within the profile range, mark M (for

Match) in the Match column. Where it is 1 level higher or lower than the profile level or range, mark V (for Variation) in the Match column. Where the job level is more than 1 level higher or lower than the profile level or range, mark NM (No Match).

5. DETERMINE THE MATCHING OUTCOME

5.1 Possible outcomes are:

- If all factor levels are within the range specified on the profile, this is a (perfect) Profile Match.
- If most factor levels match, but there are a small number of variations, marked V in the Match column, there may still be a Band Match, if ALL the following conditions apply:
 - The variations are of NOT MORE than 1 level above or below the profile level or range AND
 - The variations do NOT relate to the Knowledge or Freedom to Act factors. Variations in these factors are indicative of a different profile and/or band. AND
 - The variations do NOT apply to more than 4 factors. Multiple variations are indicative of a different profile or the need for a local evaluation. AND
 - The score variations do not take the job over a grade boundary.
- If there are any NM indicators in the Match column, there is No Match. Record this, and repeat the process with another originally identified profile. If there is no other possible profile, refer the job for local evaluation – see Local Evaluation procedure [*Job Evaluation Handbook* p. ??]

5.2 When a profile or band match has been achieved, complete the score column and remaining sections of the matching form. Whether or not a match has been achieved, all documentation should be submitted for consistency review (see below)

6. CONSISTENCY AND PUBLICATION OF MATCHING OUTCOMES

6.1 When each batch of job descriptions is matched to national profiles, they should be quality assured by nominated persons (e.g. Management and Staff Side JE leads, or a small sub-group of the JE steering group). Completed matching forms should be checked to ensure that all boxes have been filled in and reasons given in relation to the job in question. It is for local agreement to determine the mechanism and frequency for consistency checking. The outcomes should be checked for consistency against:

- ❑ Other matches completed by the same and other matching panels over an agreed period;
- ❑ 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.

6.2 Any apparent inconsistencies in matching should be referred back to the matching panel with any queries and/or comments. The matching panel should review the match in question and answer any queries or make amendments to the original match, as appropriate.

6.3 Only when consistency checking is complete and any apparent inconsistencies resolved should the matching form be issued to jobholders covered by the match, together with the relevant national profiles and a personal letter explaining the proposed pay banding and what to do in case of disagreement (see below). It may be appropriate to issue matching forms in occupational groups, to be agreed locally.

7. RESOLUTION OF QUERIES AND PROBLEMS

7.1 In the event that groups of staff or an individual is unhappy with the result of matching they may request a rematch by a panel with the majority of its members different from the previous panel. Such a request must be made within three months of notification of the original panel's decision. In order to trigger a review, the postholder(s) must provide details in writing of where they disagree with the match and evidence to support their case using the matching review form

7.2 The second panel operates in the same way as the first and follows the procedure above, including having available/contactable job advisers or representatives. The second panel can:

- Confirm the same match;
- Confirm a match to a different profile;
- Or, exceptionally, refer the job for local evaluation.

7.3 The postholder has no right of appeal beyond the second panel if their complaint is about the matching outcome.

7.4 In the event that the postholder can demonstrate that the process was misapplied they may pursue a local grievance about the process, but not against the matching or pay banding decision. Where a grievance is upheld, a potential remedy may be a reference to a new matching panel.

NOTE: * Examples of job families are: Nursing and Midwifery; Allied Health Professions (AHP); Administrative and Clerical jobs, Support Services.

Examples of occupational groups within these job families are: Nursing; Speech and Language Therapists; Finance jobs; Portering jobs.