

NHS Scotland Agenda for Change Job Evaluation Policy: Job Evaluation Resources and further information

This paper supplements the NHS Scotland Job Evaluation Policy (June 2021) ([available here](#)) and provides details of the resources used in job evaluation (JE) as well as further information on maintaining the scheme to enable activities to be carried out effectively.

Contents include:

- [Key principles and values:](#)
- [Job evaluation resources and information](#)
- [National Profiles](#)
- [Job Evaluation record keeping](#)
- [Maintaining capacity in job evaluation](#)
- [Job Evaluation training](#)
- [Matching/evaluating new jobs](#)
- [Job matching process – flowchart](#)

Key principles and values:

This policy should be applied using the NHSScotland values of:

- care and compassion
- dignity and respect
- openness, honesty and responsibility
- quality and teamwork

The policy is person-centred and there are a number of key principles which must be applied:

- Right to be represented
- Equality and diversity
- Confidentiality
- Supportive approach and open communication
- Equity of access

For more detailed information on these, please refer to the [NHS Scotland Workforce Policies website](#).

Job evaluation resources and information:

Information and resources related to job evaluation are held on the [Scottish Terms and Conditions Committee website](#) job evaluation page. The key documents relating to job evaluation are the [JE Handbook](#) and [National job profiles](#). These are reviewed and updated on a regular basis. ([Back to the top](#))

NHS SCOTLAND JOB EVALUATION GOOD PRACTICE GUIDE 4

A good **job description** is needed for a robust job matching outcome. This should clearly articulate the requirements and competence for the role and stipulate the essential qualifications and/or experience required to be employed in the role. An NHS Scotland Agenda for Change (AfC) job description template and guidance notes on completion is [available here](#).

Having **up-to-date, agreed job descriptions** is good HR practice. Their main purpose is to ensure that employees and their line managers have a common understanding of what is required of the jobholder. The required information is generally set out in the form of a list of job duties.

Similarly, having **person specifications** available for all posts is good HR practice because it facilitates the **recruitment process**. ([Back to the top](#))

National Profiles

NHS jobs are matched to [nationally evaluated profiles](#). These are based on information from NHS job descriptions and additional information such as job questionnaires. Having national job profiles also provides a framework to check the consistency of local evaluations.

Profiles work on the basis that there are posts in the NHS which are standard and have many common features. The job evaluation scheme uses a common language and a common set of terms to describe all jobs. It uses these to highlight similarities between jobs.

Profiles apply these principles to particular job groups, for example administrative services or health science services.

Profiles are organised into groups of job families:

- Administrative Services;
- Allied Health Professionals;
- Emergency Services;
- Health Science Services;
- Nursing and Midwifery;
- Personal Social Services;
- Professional Managers; and Support Services.

It is the responsibility of the [UK Job Evaluation Group](#) (JEG) to produce the national job profiles. JEG is a subgroup of the [NHS Staff Council](#) and consists of representatives of both the NHS trade unions and NHS organisations, including NHS Employers from all four UK countries. ([Back to the top](#))

Job Evaluation record keeping

It is important that NHS Boards keep good records of job matching or job evaluation and any subsequent processes, including review and re-evaluation.

Evidence for banding outcomes should be documented and audit trails of decisions be accessible should any clarification be required. **TurasJE** must be used by all NHS Boards to record job evaluation activities.

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Historical records including those formerly held on CAJE also need to be kept in case organisations have to supply these in defence of an equal pay claim. Failure to maintain records creates a significant risk to NHS Boards. ([Back to the top](#))

Maintaining capacity in job evaluation

The NHS job evaluation scheme's success depends on having enough trained panel members and job analysts locally to carry out job evaluation procedures for all jobs in line with the processes contained in the NHS JE Handbook.

Here are some top tips in ensuring your NHS Board always has capacity for job evaluation.

Create an action plan

The best solution is to have an action plan which includes:

- Details of how you will maintain sufficient numbers of trained practitioners
- Arrangements for agreed time off for practitioners
- Providing support for newly-trained practitioners e.g. from more experienced colleagues
- Access to refresher training
- Succession planning measures for replacing practitioners when they move on

Use your time effectively

It's also good practice to use your time effectively. Some examples of this are:

- Make sure you have the job information quality checked before this is provided to a panel
- Ask your job evaluation leads (or equivalent) to suggest profiles to consider
- Ask the panel to read the job information in advance of meeting.

Need a temporary solution?

Preparation is key. If you can see that there may be problems on the horizon, plan early in order to mitigate them. We would encourage all NHS Boards to plan ahead but understand that sometimes this is not possible, such as with the COVID-19 emergency.

Temporary solutions should be time-limited with clear measurable goals and depend on as little external support as possible. The following may be useful, in descending order:

- Solve the problem internally - this would include commissioning more training and making sure that everyone recognises the importance of job evaluation. The STAC JE Sub Group can provide advice on training, including job matching, job analysis and job evaluation, consistency checking and refresher training.
- Liaise with neighbouring NHS Boards to see if they can help by running joint panels and sharing resources with your organisation, or even running panels on your behalf. ([back to the top](#))

NHS SCOTLAND JOB EVALUATION GOOD PRACTICE GUIDE 4

Job Evaluation training

In line with the national NHS terms and conditions of service, every job matching panel member and job analyst is required to attend a training course and must be up to date on current practices, before they take part in local panels.

Consistency checking practitioners must also be appropriately trained and have relevant experience of job evaluation to undertake this work.

NHS Staff Council accredited training courses include modules on:

- the principles of equal pay
- how to avoid bias
- the building blocks of the job evaluation scheme
- the importance of consistency checking in job evaluation
- the importance of partnership working

Information on training provision is regularly communicated to Job Evaluation Leads across NHS Scotland.

[\(Back to the top\)](#)

Matching/evaluating new jobs

The job evaluation handbook ([chapter 3 maintaining good job evaluation practice](#)) includes full and detailed guidance on the procedure that should be used where a new role to the service has been created and there is no post holder in post.

Key points:

- New jobs will need to be matched or evaluated in order that a pay band can be determined for recruitment purposes.
- This exercise should be carried out by experienced matching or evaluation panel members in partnership.
- Some questions may not be answerable at this stage and the full nature of the role may not yet be known (see below).
- After recruitment, NHS Boards should allow a reasonable period of time for the job to 'bed down' and this may vary according to the nature of the job. Typically, this period will be **between six months to a full year** to determine the full job demands.

After this period, the postholder and/or their manager should review the job description and, if any changes are made to it, the job evaluation outcome must be reassessed using the matching or evaluation procedure as appropriate.

- The standard procedure for this reassessment either by job matching or evaluation panel should be followed. This includes checking that the outcome is consistent with other similar jobs on a factor by factor basis.

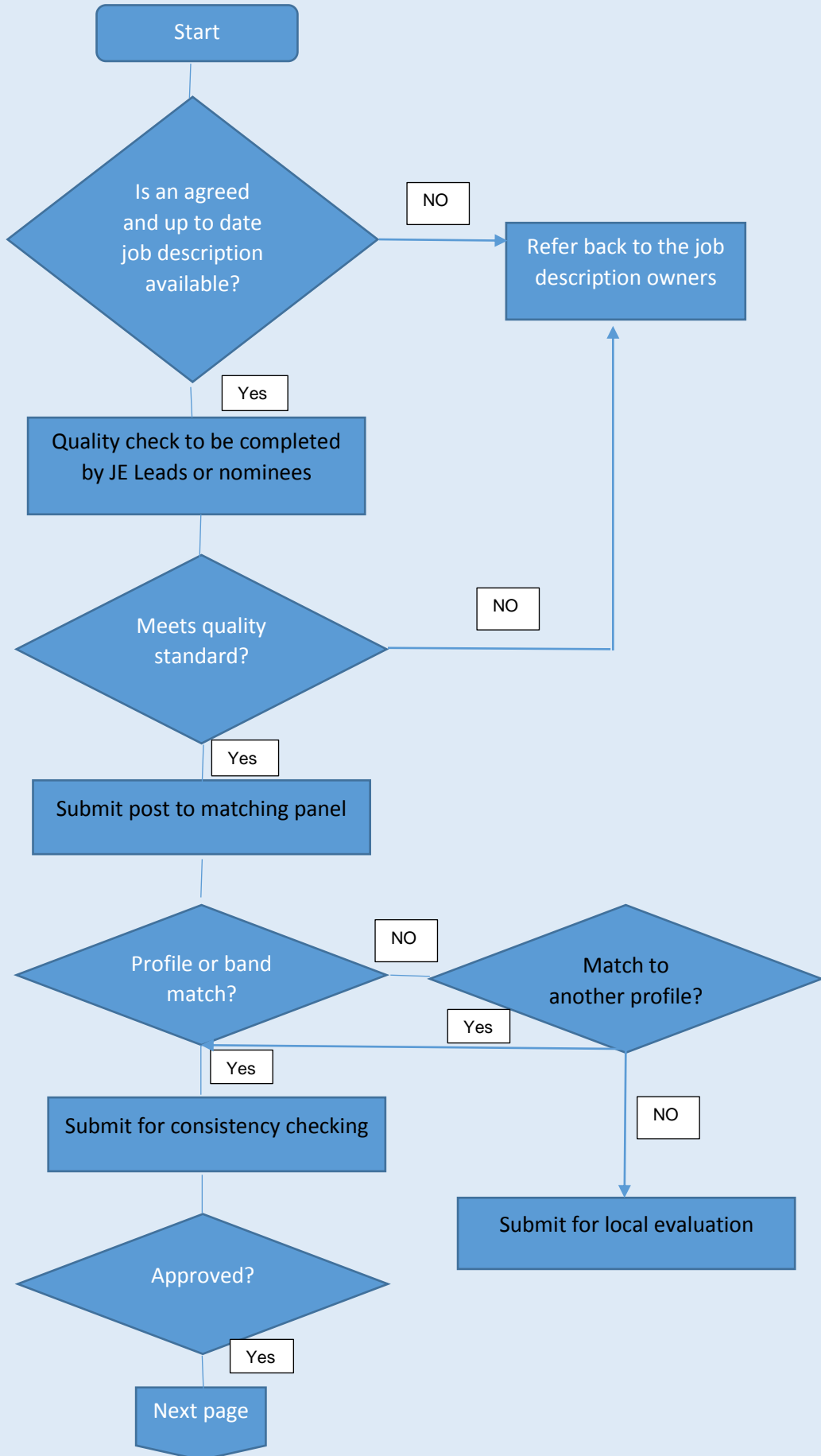
The application of the reassessed job evaluation outcome would normally be backdated to the start date of the new job. Note that the outcome can go up or down.

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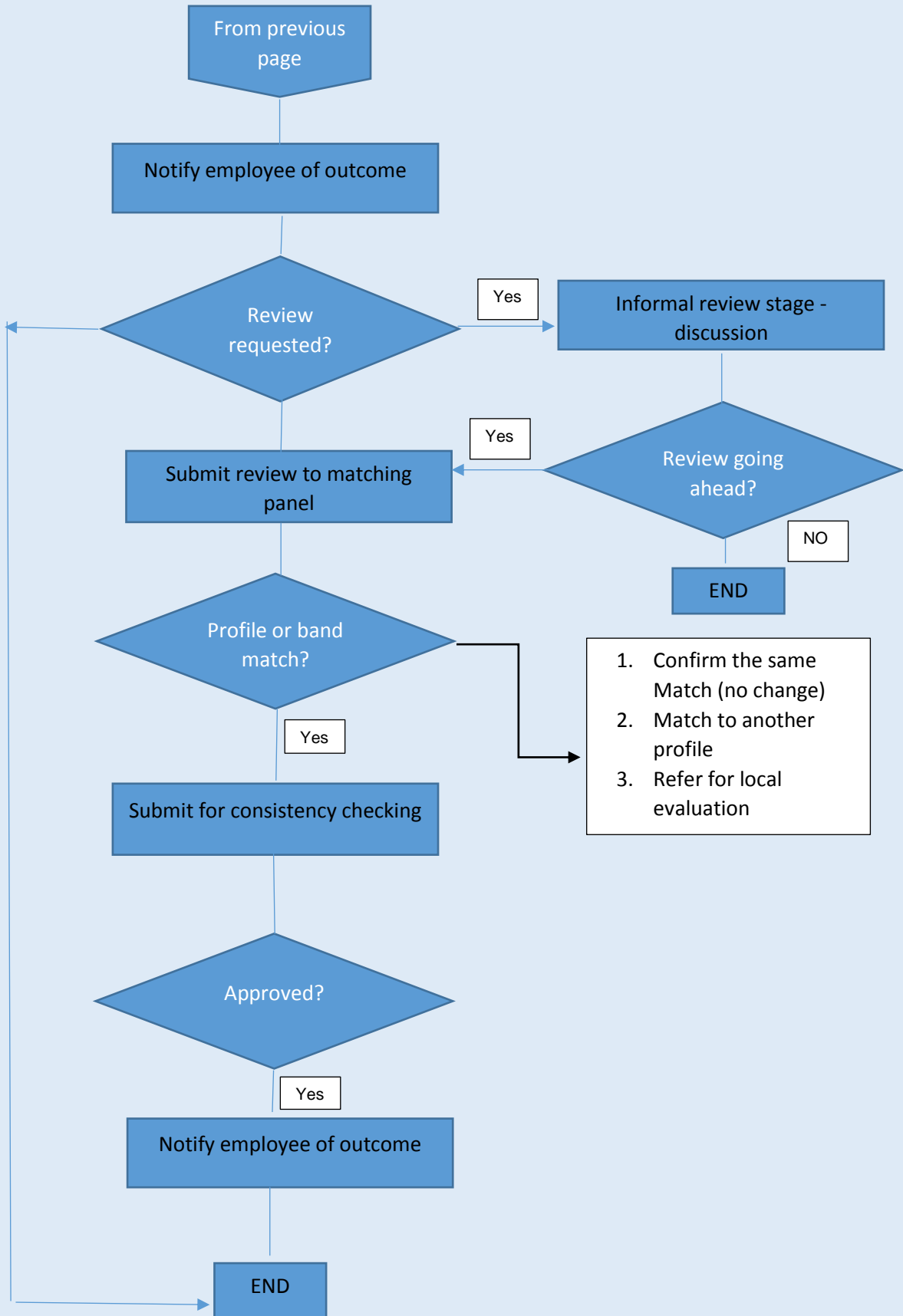
As outlined in the JE policy, in situations where the reassessed outcome results in a band decrease, the employee would continue on their current AFC band, however when the post becomes vacant the new band would apply.

New jobs which are likely to become commonly occurring across the NHS but do not match any of the published profiles, should be locally evaluated and then referred to NHS Staff Council to consider whether a national profile should be produced. ([Back to the top](#))

Job matching process – flowchart



NHS SCOTLAND JOB EVALUATION GOOD PRACTICE GUIDE 4



[\(Back to the top\)](#)