GUIDANCE ON ASSIMILATION

The assimilation process is now becoming the focus of attention as staff receive their new Agenda for Change pay arrangements.

Below is a range of examples, together with the guiding principles behind which assimilation should take place in Wales. This seeks to achieve maximum consistency in the assimilation of staff to the new conditions of service in line with paragraphs 46.9 – 46.16 in the national agreement.

The intention is not to cover every possible assimilation scenario – rather, to establish guiding principles which will assist local employers in the assimilation process.

Examples of application

E.g. 1 – “single assimilation”

This is the example of the most straightforward type of assimilation.

**Guiding principle: assess basic pay as at 1 October, include any leads/allowances, and assimilate to new pay scale.**

A grade E psychiatric nurse (basic salary of £18,830, plus £600 psychiatric lead) has been in post prior to 1 October and is placed into Band 5. Total pay at 1 Oct 2004 = £19,430, therefore. Preceptorship arrangements do not therefore apply to this post.

They are assimilated in August 2005. They assimilate to the next equal or higher point to £19,430 as at the 1 October 2004 (therefore £19,819). This becomes £20,458 with effect from 1 April 2005 due to the national pay award.

If the person has an incremental date after 1 Oct 2004, this should be honoured with a corresponding Agenda for Change increment. For example, if the person was due an increment on 1 Jan 2005, salary would increase to £20,458 on that date, and increase to £21,118 on 1 April 2005.
E.g. 2 – “double assimilation” (1)

This is an example where an individual’s situation has changed since 1 October 2004.

**Guiding principle: treat each change as an assimilation to the nearest Agenda for Change pay point.**

An IT programmer (A&C Grade 6, basic salary £21,711 plus £514 ADP), is assigned to Band 5 and in post before 1 Oct 2004.

Base pay on 1 October 2004 = £22,225 therefore.

On 1 Jan 2005 they become entitled to an increased ADP of £1,542

New base pay = £23,767 therefore.

In August 2005 they are assimilated to Pay Band 5. As at 1 October 2004 they assimilate to £22,483 (the next equal or higher AfC point to £22,225) until 1 Jan, when they increase to £23,442. This becomes £24,198 on 1 April 2005 with the national pay award.

E.g. 3 – “double assimilation” (2)

This is an example of a promotional increase, even where both jobs are placed in the same pay band – in this case, Band 5.

**Guiding principle: as in e.g. 2 above, treat each change after 1 October 2004 as a separate assimilation.**

A D grade staff nurse (salary £18,830) is promoted to E grade (£19,500) on 1 March 2005.

Both jobs are placed in Band 5.

1 October 2004 – assimilate to next equal or higher point on Band 5 = £19,180. Assimilate again on 1 March to the next equal or higher point to £19,500 = £19,819.

New salary from 1 March = £19,819, which increases to £20,458 on 1 April 2005.

E.g. 4 – starters post 1 October 2004

**Guiding principle: if assimilating individuals who started after 1 October 2004, leads and allowances should be included in base pay even if they only applied from a time after the national assimilation date.**

An A&C Grade 5 IT programmer joins the NHS on 1 March 2005 earning £20,077 plus £514 ADP.
Total base pay = £20,591

They are assimilated in August into Band 5, and on 1 March they therefore assimilate to £21,044 (next equal or higher AfC point), which becomes £21,723 on 1 April 2005.

E.g. 5 – “substitution pay”

This is a common example of a situation where, to provide continuity of service, individuals have been asked to assume the duties of a higher Whitley grade after 1 October 2004.

*Guiding principle: salary is increased during an acting up period prior to assimilation and subsequently reduced as it would have been under Whitley Council provisions. This is for a specific time limited change of job.*

A D Grade staff nurse, incremental date 1 July (Whitley pay £18,230) “acts up” to E grade from 1 August 2004 until 1 May 2005. They are to be assimilated into Band 5.

Whitley acting up pay therefore = minimum of the Whitley E scale minus the minimum of the D grade scale divided by 2 and rounded up to the nearest £3 (!)

= £18,230 minus £17,060 divided by 2
= £585

Base pay as at 1 October 2004 is therefore £18,230 plus £585
= £18,815

Assimilation as at 1 October 2004 is therefore to the next equal or higher AfC point at £19,180. This increases to £19,798 on 1 April 2005.

When the acting up period finishes, the person resumes D grade duties. Their salary then becomes the previous D grade pay point (£18,818), increased to take account of the pay award in April 2005, and they are placed on the next equal or higher point on Band 5, which is £19,248. They will gain in Agenda for Change increment on 1 July, taking their pay to £19,798.

E.g. 6 – NVQ II/III qualification for “A” and “B” Grade Whitley staff

This is an example of an unusual Whitley Council arrangement which rewarded staff for achieving an NVQ level II or III by way of enabling them to receive a final pay point on the A and B grade pay scales.
Principle: the final pay scale point for A and B Grade N&M staff is to be treated as a normal increment for the purposes of assimilation. An individual may hold the qualification from Day 1 in an A or B grade post but will not progress to this point until they have progressed through the rest of the scale in 12 monthly incremental intervals.

It should be replaced by the appropriate Agenda for Change increment.

e.g. An A grade member of staff earns £12,615 as at 1 October 2004. The person has been at this point for 18 months.

On 1 December 2004 the individual obtains an NVQ level II and under Whitley Council provisions, moves to £13,025. The Job is placed in Band 2.

Base pay as at 1 October 2004 = £12,615.

Assimilate to the next equal or higher Band 2 point = £12,893.

On 1 December 2004 this increases to £13,266, which increases to £13,694 as at 1 April 2005.

E.g. 7 – Pay protection

This is an example of how pay protection should apply under the assimilation process.

Guiding principles: as per Section 46.25 of the T&C handbook

A member of staff aged 45* earns £20,000 as at 1 October 2004 and they are placed in Band 4.

Their new salary = £18,647 as at 1 October 2004 (top of Band 4) but they are protected on £20,000, which increases to £20,645 on 1 April 2005. After 1 October 2005, their pay “marks time” until the top of Band 4 exceeds £20,645, or until 31 March 2011.

* N.B. special arrangements apply for staff who are close to retirement (para 46.17 of the handbook refers)

E.g. 8 – Promotion

This is an example of where an individual has moved from a Band 5 to a Band 6 job by the time they come to be assimilated. This is arrived at by Agenda for Change job matching/evaluation.

Principle: promotion rules apply rather than double assimilation.
e.g. An E grade Staff nurse is promoted to F on 1 December 2004. The two jobs are subsequently banded at 5 and 6 respectively.

Basic salary as at 1 October 2004 = £19,500, increase to £20,220 on 1 December 2004.

Assimilate to Band 5 next equal or higher point on 1 October = £19,819 and promote to next Band 6 pay point on 1 December = £21,630 (UNLESS a transitional point is in force for this group of staff in this unit or work area, in which case the increase would be to £20,778).

Agreed by the Partnership Forum - October 2005