Policy and Procedure for Evaluating New Jobs and Re-Evaluation of Changed Jobs

<table>
<thead>
<tr>
<th>Ref</th>
<th>Date</th>
<th>Purpose of Issue/Description of Change</th>
<th>Planned Review Date</th>
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<tr>
<td>HR073</td>
<td>January 2007</td>
<td>Replaces the Re-grading procedure following the implementation of the Agenda for Change job evaluation process.</td>
<td>31/03/2011</td>
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**Responsible Officer**

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<tr>
<th>Human Resources Project Manager</th>
<th>Approved by the Partnership Board</th>
<th>Date Approved by Committee / Board / Group</th>
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<td></td>
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<td>April 2007</td>
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**Bwrdd Iechyd Addysgu Powys** is the operational name of Powys Teaching Local Health Board.

*Bwrdd Iechyd Addysgu Powys* yw enw gweithredol *Bwrdd Iechyd Lleol Addysgu Powys*

*Powys Teaching Health Board* is the operational name of *Powys Teaching Local Health Board*
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Procedure for Evaluating New Jobs and Re-evaluation of Changed Jobs

1. ESR Terminology

This document and the forms in Appendix 1 & 2 use the following terminology associated with the ESR Payroll/Personnel system.

Employee/Post holder = Assignment
Job Title/Job/Post = Position
Department/Function = Organisation

Therefore when new role is created or an employee’s (assignment’s) role changes to create new job (position), a unique job title (position) should also be created. This is necessary since the ESR system requires all “assignments” to be attached to a “position” that in turn is attached to an “organisation”. All assignments attached to the same position will have the same pay band.

2. Background

In order to implement Agenda for Change (A4C), employers and staff, in partnership, have used the NHS Job Evaluation Scheme as a means of determining pay bands for positions.

The A4C agreement requires fairness and equality in line with equal pay legislation. This will be a continuing requirement as the THB looks at new positions and mainstreams the job evaluation process.

There is a need for the NHS Job Evaluation Scheme to continue to be used for determining the banding of positions and consequently staff pay rates. This will apply to all new positions and those that have changed significantly since they were last evaluated.

The THB must have a procedure for matching/evaluating positions in the future and ensure that there will be enough trained job evaluation practitioners to enable matching, analysis and evaluation to continue.

3. Job Evaluation and Service Improvement

Job evaluation as a tool for A4C does not of itself achieve service improvement, but the process may assist in the identification and development of new roles and it is necessary to ensure that new positions are slotted in to the THB structure at the correct level.
THB managers need to consider whether to replace vacant positions with a similar position or to evaluate the needs of the service and create new roles in line with service improvement. This may involve job redesign and positions that involve cross disciplinary roles.

4. Procedures for new and changed roles

4.1 Principles

- Employees can seek trade union/professional body advice if required.

- The procedures will be carried out in partnership with staff side to ensure equity and fairness in accordance with nationally agreed rules and procedures.

- Trained job matchers/analysts/evaluators will work in partnership to determine pay bands in accordance with the National Job Evaluation Handbook. These staff will use the knowledge and expertise developed during the implementation of A4C.

- Where a member of staff and manager are in dispute about whether a job has changed sufficiently to merit a review, then HR and staff side representatives will advise on how to proceed. However, every employee has the right to have their job reviewed if they consider it has changed.

4.2 New Roles

- Where a new role has been developed, the job description, person specification, organisation chart and post outline will be sent by the responsible manager to the relevant THB Director. For Business Services Centre posts this will be the THB Chief Executive or Director of Human Resources. The “New Role Evaluation Request” form in Appendix 1 will be used for this purpose and will require the manager to justify the need for the new role and the source of funding.

- Following approval by a THB Director the documentation will be sent to the HR Department, Job Evaluation Team who will arrange for the position to be matched, if an appropriate National Profile exists, or if not, undertake local evaluation based on the information available.

- The outcome must subsequently be consistency checked before the provisional pay band is notified to the responsible Director and manager. The HR Department, Job Evaluation Team will ensure that the banding outcome is notified to the Director and Manager within 1 month of receipt of the “New Role Evaluation Request” form.
• The Director and manager must agree that the allotted pay band is affordable. The new position and revised structure must be entered into the ESR system by notifying the Workstructures Administrator using the agreed procedure, before the post is advertised.

4.3 Changed Roles

• All positions change over a period of time but for most the job evaluation outcome will not normally be affected unless there are significant changes. A significant change would be a step increase in overall responsibility or demand. Some positions have evaluated or matched close to band boundaries and the banding for these may change with only limited changes to job demands.

• Where an assignment(s) and manager agree that the demands of the position have changed then the “Role Re-evaluation Request” form in Appendix 2 must be completed and together with a revised job description, person specification, organisation chart and post outline sent to the relevant Director for approval. For Business Services Centre positions this will be the THB Chief Executive or Director of Human Resources. The manager will also need to determine whether or not all assignments attached to the position have changed their role or a single or reduced number of assignments are affected.

• Following approval by a THB Director the documentation will be sent to the HR Department, Job Evaluation Team who will arrange for the position to be re-matched, if an appropriate National Profile exists, or if not, the assignment(s) will be requested to complete a Job Analysis Questionnaire.

• When the pay band for the changed position has been determined, and consistency checked the assignment(s), their manager and Director will be notified of the outcome. The HR Department, Job Evaluation Team will ensure that the banding outcome is notified to the Director and Manager within 1 month of receipt of the “Role Re-evaluation Request” form.

• The manager must also forward forwarded details of the revised position and revised structure to the Workstructures Administrator in accordance with the agreed procedure.

• Where the pay band has increased payment will be backdated to the date the request was received.
• When the employee’s manager receives notification they will be responsible for notifying the Payroll Department of the revised pay band and the effective date of the change using a Staff Changes form.

• The staff involved will have the right to request a review of the outcome within 3 months of receipt of the pay band notification letter. The letter will include a review request form.

• The review will be carried in accordance with the THB’s existing A4C Review Request Process.

5. Trained staff for matching, analysis and evaluation and post outline completion.

The THB will need to ensure that sufficient staff are trained in the matching, analysis and evaluation processes of the NHS Job Evaluation Scheme and the Knowledge and Skills Framework for continuity in the future.

In the future practitioners may not be required as often as they are currently. However their skills will need to be maintained through refresher training on a regular basis.

It will also be necessary to train new practitioners to replace those staff that leave the THB or are no longer able to contribute. The THB currently has its own accredited trainers; however consideration will also be given to collaborating and sharing training and refresher training with neighbouring NHS organisations.
POWYS TEACHING HEALTH BOARD - NEW ROLE EVALUATION REQUEST FORM

New Position Title: ________________________________________________

Organisation: _______________ Hospital/Location: ____________

The job description, person specification, organisation chart and post outline for the new role must be attached to this form.

Reason and need for the new role:

Source of funding for the new role:

Manager requesting the new role evaluation:

Name: _______________ Designation: _______________
       (Capitals)              (Capitals)

Signature: _________________ Date: __________

Director approval:

Signature: _________________ Date: __________

The completed form together with the job description, person specification, organisation chart and post outline must be forwarded to the HR Department, Job Evaluation Team, Vera Vallins Room, Bronllys Hospital.

____________________________________________________________________

HR Department, Job Evaluation Team use only

Date form received: ____________ Post reference No: ____________

Evaluation arranged and completed on: ____________

   Consistency check completed on: ____________

   Manager and Director notified of provisional pay band on: ____________

   Date of final evaluation when the assignment has been in post for at least 6 months: ____________

   Consistency check completed on: ____________

   Manager and Director notified of final pay band on: ____________
Appendix 2.

POWYS TEACHING HEALTH BOARD - ROLE RE-EVALUATION REQUEST FORM

Assignment Name(s)  Staff Number

______________________  ________________

______________________  ________________

______________________  ________________

______________________  ________________

New Position Title: _________________________  Current Pay Band: ______

Organisation: _______________  Hospital/Location: _______________

The changed job description, person specification, organisation chart and post outline for the position, plus an effort factor Supplementary Questionnaire (signed by the assignment(s) and their line manager) must be attached to this form.

Effective date of change in responsibility:  _______________

Changes in responsibilities and demands to the original position:

Manager Supporting the changed role evaluation:

Name: ___________________  Designation: ___________________

                      (Capitals)                      (Capitals)

Signature: _________________  Date: __________

Director approval:

Signature: _________________  Date: __________
The completed form together with the job description, person specification, organisation chart and post outline, plus an effort factor Supplementary Questionnaire (signed by the assignment(s) and their line manager) must be forwarded to the HR Department, Job Evaluation Team, Vera Vallins Room, Bronllys Hospital.

HR Department, Job Evaluation Team use only

Date form received: ____________  Position reference No: ____________

Re-match completed: ____________  Consistency check: ____________

Manager and assignment(s) notified if the position could not be matched and evaluation is necessary: ____________

Completed Job Analysis Questionnaire received if applicable: ____________

Evaluation completed: ____________ Consistency check: ____________

Assignment(s), manager and Director notified of re-evaluated pay band on: ____________
Dear

**New role provisional band notification letter**

I refer to the following new role job description(s) recently forwarded for evaluation.

This/these have been matched and consistency checked as requested. The position(s) has/have been given provisional banding(s) as detailed below.

<table>
<thead>
<tr>
<th>Job Ref.</th>
<th>Position</th>
<th>Provisional Band</th>
<th>Salary Range</th>
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It should be confirmed that the source of funding is sufficient to cover the cost of the position before placing the advertisement.

Please let me know if you have any queries regarding this/these outcome(s).

Yours faithfully

**HR Department, Job Evaluation Team**

Cc Director
Dear

Re-evaluated role pay band notification

I am pleased to tell you that the revised job description and person specification that you agreed with your manager has now been matched to a national profile/evaluated.

If the pay band has increased the revised payment will affect your salary backdated to the date that your application is received.

Attached to this letter is a Matched Job/Evaluation Report showing the pay Band and factor scores for your position, which will assist you with knowing how the revised Band was determined. The points score on the form has no effect on your new salary point on the pay Band; this is worked out in accordance with the Agenda for Change: NHS Terms and Conditions of Service Handbook.

The evaluation of your revised position has been agreed by a joint panel; however you can request a review if you feel there is a discrepancy. If you think you have grounds to request a re-match, you must fill in the enclosed re-match request form and hand it to your manager. If you have a query on your Banding you must raise it with your manager or Union Representative. You have 3 months from the date of this letter to do this. Details of the Local Health Board’s review process can be found on the Agenda for Change intranet website.

Yours sincerely

HR Department, Job Evaluation Team

Cc Assignment’s manager
   Director