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# **AGENDA FOR CHANGE**

## **HOSPITAL OPTOMETRISTS PREPARING FOR IMPLEMENTATION**

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## **INTRODUCTION**

Agenda for Change is the largest change ever to take place in the NHS and is the biggest HR activity ever undertaken anywhere affecting over 1million people working in the NHS.

Agenda for Change was announced on 18<sup>th</sup> March 1999 by John Denham, the then Minister for Health. It was originally intended to be completed in just two years. However the project is enormously complex and has over run every milestone on the way. The roll out across the whole NHS will be from December 2004. It is intended that all posts will be allocated new grades between December 2004 and March 2005. In the unlikely event of a new lower grading there will be pay protection for several years. There will be eight pay bands numbered 1 through to 8, with Band8 subdivided in four Bands 8a, 8b, 8c & 8d.

**Underlying Principal:** Equal pay for work of equal value.

### **Jobs are assessed through:**

1. Knowledge and Skills Framework
2. Job Factor Plan

### **The Job Factor Plan has 16 factors:**

- Communication & relationship skills
- Knowledge, Training & Experience
- Analytical & Judgement skills
- Planning & Organisational skills
- Physical Skills
- Responsibility for Patient care
- Responsibility for Policy / service development
- Responsibility for Financial and Physical Resources
- Responsibility for Human Resources
- Responsibility for Information Resources
- Responsibility for Research and Development
- Freedom to Act
- Physical Effort
- Mental Effort
- Emotional Effort
- Working Conditions

The scheme envisages 80% of all NHS jobs will be assimilated to Agenda for Change by matching jobs to National Job Profiles the remaining posts are expected to undergo individual job evaluation. Implementation is through two stages

#### **1. Pilot Trusts - Early Implementer Sites**

(Sunderland & Walton in Liverpool are the only pilots to employ optometrists.) Sunderland has a wide range of different optometry jobs. Walton is a smaller department and is likely to be following Sunderland's lead. Many issues at pilot sites are unresolved. The optometry outcomes are not yet complete

#### **2. Other Employers – Scheduled to implement in December 2004.** The experience of pilot sites is meant to inform the process as it rolls out to all the other sites.

By Spring 2004 assessment of jobs in all pilot trusts had been completed (but the allocation of grades has not) and a contract to write computer software to evaluate jobs has recently and perhaps optimistically been issued for delivery in September 2004.

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## **INTRODUCTION (Continued)**

### **WHAT HAS BEEN GOING ON? - Two parallel processes have been going on:**

1. Sunderland posts are going through local job evaluation.  
Work has involved re-development of job descriptions, person specifications individual job profiles etc.  
Results of A4C banding of Optometry posts from this exercise were due to be released 21<sup>st</sup> May 2004. This did not happen.
2. The National Assessors for Hospital Optometry Posts (appointed by NHS Executive) have developed a range of draft National Profiles for optometry posts.  
These draft profiles cover posts across the pay bands to give career progression.  
These draft profiles have been endorsed by the College of Optometrists.  
Discussions are ongoing towards agreement of National Profiles  
Our key negotiation aim points are:
  - To maximise entry level
  - To maximise *top job* grade
  - To provide a range in between to allow satisfactory career progression

**Remember: MATCHING JOBS TO JOB PROFILES CAN NOT BE CARRIED OUT UNTIL THE OPTOMETRY NATIONAL PROFILES ARE AGREED.**

- Individuals do not have to accept outcome from matching against national profiles.
- Remember: IF YOU DO NOT AGREE WITH THE MATCH AGAINST A NATIONAL PROFILE YOU CAN STILL ASK FOR LOCAL EVALUATION.**
- There is a right to appeal locally at (Trust level)

### **WHAT SHOULD I BE DOING?**

In the interim individuals need to be preparing the update of job descriptions (JD).

- Read the Knowledge & Skills Framework
- Read the Job Factor Plan
- Watch the AOP website – Hospital Optometry section.

**Download:** *A4C Pay rates from Hospital Pay Section as PDF file*  
*See A4C section for key documents & web link to DoH A4C web page*

- Think out of the box – remember your job will be compared to other jobs using the Knowledge and Skills Framework and Job Factor Plan.
- Try to think wider by using A4C terminology - think beyond Optometry.
- The people reading your JD are unlikely to be optometrists - use terms they understand.
- Be realistic - but look up the words & phrases that score points.
- Do include a statement of Job Purpose explaining purpose in two or three sentences.
- Do include an organisational chart showing how the job fits into the wider organisation.
- Talk with a wide range of colleagues.
- Remember Job Descriptions have to be agreed between employee and manager.

**DO NOT SIGN A JOB DESCRIPTION YOU ARE NOT HAPPY WITH.**

- Employers are now beginning to ask for job descriptions  
– However they have nothing to match them against at present.
- Sample Job Descriptions & Agreed National profiles will be on the AOP website ASAP
- You may be able to make a better JD as more information becomes available!
- Be patient!

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## **A4C IN BRIEF**

Agenda for Change aims to introduce a new NHS wide pay system giving *all* NHS employees a fairer deal in pay and conditions. There are a number of concepts and issues involved. In order to aid understanding Agenda for Change is summarised in the following four pages and there after presented in further detail.

### **JOB EVALUATION -**

- Is a system for comparing different jobs to provide a rational, fair and defensible basis for a pay structure.
- Looks at jobs, not people.
- Compares Jobs fairly.
- Is developed from a need to have a rational basis for pay structures.
- Provides a rational mechanism for determining which jobs should be banded together in any pay grade.
- Applies agreed rules to a range of jobs.
- Takes account of **what** is being done, not **how well** it is done.
- Provides an internal rank order of jobs.

### **DIVERSITY**

The NHS comprises a: -

- Vast range of jobs and job demands;
- A wide geographic spread.

The NHS employs: -

- Staff from a wide range of different cultures, religions and ethnic groups;
- Predominantly female staff;
- Staff working in a variety of flexible work patterns.

### **JOB SEGREGATION AND PAY INEQUALITY**

Traditionally men, women and ethnic groups and people with disabilities were disproportionately represented in: -

- Managerial and skilled manual jobs;
- Caring, teaching, cleaning and serving jobs;
- Unskilled and semi-skilled jobs.

***Pay inequalities have resulted from this.***

### **PARTNERSHIP WORKING**

Partnership working between staff and management has been integral to every aspect of the NHS Job Evaluation Scheme (JES), including:

- Scheme design and development;
- Information collection and analysis;
- Evaluation and scoring of jobs;
- Training and implementation.

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## **A4C IN BRIEF (Continued)**

### **THE CHALLENGE IN THE NHS**

The situation: -

- Over 1 million employees;
- Hundreds of different jobs;
- 650 'old' grades;
- An aim to allocate jobs to the new grades fairly and objectively.

The solution: -

- A representative range of jobs were evaluated;
- Approximately 200 job profiles were developed;
- 8 new grades were created;
- All jobs can be matched to the job profiles and slotted into the 8 grades.

### **THE PROCESS (1) – *National Level***

Jobs selected for evaluation by National Job Evaluation Working Party (JEWPs).

16 factors agreed to measure levels to measure all jobs against: -

- Communication and relationship skills
- Knowledge, training and experience
- Analytical and judgemental skills
- Planning and organisational skills
- Physical skills
- Responsibilities for patient/client care
- Responsibilities for policy and service development implementation
- Responsibilities for financial and physical resources
- Responsibilities for human resources
- Responsibilities for information resources
- Responsibilities for research and development
- Freedom to act
- Physical effort
- Mental effort
- Emotional effort
- Working conditions.

Job holders complete questionnaires (JAQs).

Job analysts (1 staff and 1 management) interview job holders and ensure that the JAQ is:

- Clear,
- Concise,
- Complete,
- Correct and
- Free from bias;

Revised JAQ's agreed by job holders and managers and sent for evaluation.

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## **A4C IN BRIEF (Continued)**

### **THE PROCESS (2) – *National Level***

The Evaluation Panel (2 staff and 2 management members) evaluate jobs.

Evaluations 'sore thumbed' for anomalies.

Profiles written by JEWP Profile Group.

Profiles sent out for consultation, comments received and considered by the Profile Group.

'Final' profiles approved by JSG and published.

### **THE PROCESS (3) – *Local Level***

'Local' job descriptions matched to national profiles by matching panel.

Majority of jobs matched but some jobs do not match a national profile.

Unmatched jobs evaluated locally.

- Job holder completes JAQ process repeated as for *The Process (1)* up to the evaluation stage.

### **THE MATCHING PROCEDURE**

- Local joint matching panels match groups of jobs to national job profiles.
- Panels co-opt relevant managers and TU reps to provide information and advice.
- Jobholders who consider their jobs significantly different from allocated profile provide written evidence to matching panel.
- Job graded on new structure.

### **THE MATCHING PANEL**

Compares the information on each job description with that of selected national profile.

Determines whether the job description is equivalent (whether it matches).

Looks at JES factor levels where necessary.

Records the level of the selected profile on form.

Records the proposed level for the job.

Panel indicate whether there is a match (M); variation (V) or there is no match (NM).

### **THE PROCEDURE (1)**

It is important to ensure that all documents are available for the matching panel: -

- Identify possible job matches;
- Read the job description;
- Compare the profile job statements;
- Complete the 'Relevant Job Information' box for every factor.

### **THE PROCEDURE (2)**

Compare the information on form with that of selected profile.

Determine whether it is equivalent (i.e. matches).

Look at JES factor levels where necessary.

Record the level of selected profile on form.

Record the proposed level for the job and indicate either M, V or NM.

(M = Match, V = Variation and NM = No Match).

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## **A4C IN BRIEF (Continued)**

### **DETERMINING MATCHING OUTCOME**

*Profile match* = **all** factor levels are equivalent.

*Grade match* = **all** the following apply: -

- Variations not more than 1 level above or below; and
- Do not relate to knowledge or freedom to act; and
- Do not apply to more than 4 factors; and
- Score variations do not cross grade boundary.

### **THE MATCHING OUTCOME**

If there are **any NM** indicators in the match column there is no match.

Record this and repeat the process with another profile.

When a profile or grade match has been achieved, complete the score column.

### **LOCAL EVALUATIONS**

Job holder completes JAQ.

Job analyst(s) interview.

Evaluators assess against JES rules.

Evaluation checked against national profile and other local evaluations.

Computer assisted system being developed.

### **THE ROLE OF THE JOB ANALYST**

To: -

- ensure that the JAQ is produced to agreed standards, equality requirements and time scale;
- ensure all parties satisfied with the JA process;
- to check and test the information provided by the jobholder to ensure accuracy and clarity.

***Remember: If the JAQ is inaccurate, or incomplete,  
the evaluation will be too!***

### **THE ROLE OF THE JOB EVALUATOR**

- To assess the information on the JAQ against the factor level definitions.
- To disregard any preconceptions about the job and base decisions on information provided in the JAQ only.
- To reach agreement with panel members concerning appropriate factor level.

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## **JOB DESCRIPTIONS**

Under Agenda for Change Job Descriptions will play a very important part in the job matching and job evaluation process. Accurate and concise job descriptions will assist the job matching process and help minimise delays when staff are moved onto the new pay bands. It is therefore important that job descriptions are up to date and accurately reflect the job role being undertaken.

### **What are Job Descriptions?**

Job descriptions describe an employee's role, what is required to do the job and not how they do it or their personal contribution.

Accurate job descriptions provide the basic building blocks on which the recruitment process is built. They act as:

1. A tool in recruitment - to assist in the writing of job advertisements.
2. A tool in selection - to help make decisions about who to employ
3. A basis of employment contracts- frequently employers make reference to the job description in their contracts of employment.
4. As part of an employers defence in cases of unfair discrimination.
5. As a means by which the employer's expectations, priorities and values are communicated to new members of staff.

In most cases they will include some kind of generic statement indicating that the jobholder from time to time may carry out other duties.

### **Creating and updating job descriptions**

When creating and updating job descriptions consider:

1. Identifying the tasks involved in the job;
2. Look at how, when, and why tasks are performed;
3. Identify the main duties and responsibilities of the job;
4. Consider the physical, social and environmental conditions of the job.

Job descriptions should be clear, concise, and accurate. They should be accessible for all staff. It is useful to make explicit the implications for jobholders of other human resource policies. For example compliance with the organisation equal opportunities policy.

Consider what is essential and desirable for the job role. The following categories may be useful when identifying tasks, duties and responsibilities:

- Autonomy - what level?
- Communication – who / how / what?
- Computer literacy?
- Counselling skills - who? what?
- Skills - what?
- Leadership skills - what?
- Management skills - what? - Organising? Planning etc?
- Negotiating skills - to do what?
- Qualifications - required for the role, not what you may have?
- Relevant experience
- Teaching/Training - what and who?

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## **JOB DESCRIPTIONS Continued**

### **WRITING A JOB DESCRIPTION**

Job descriptions should be based on an analysis of the job and should be as brief and factual as possible. The typical headings to consider are:

**A. Job title** - should indicate as clearly as possible the function in which the job is carried out and the level of the job within that function.

**B. Grade/rate of pay**

**C. Main location** - where the job will be based.

**D. Reporting to** - the job title of the manager or supervisor to whom the jobholder is directly responsible.

**E. Reporting to jobholder** - the job titles of the posts directly reporting to the jobholder.

**F. Summarise Overall Purpose** - describe as concisely as possible the overall purpose of the job. The aim should be to convey a broad picture of the job, which will clearly distinguish it from other jobs and establish the role of the jobholders and the contribution they should make towards achieving the objectives of the organisation. When preparing the job description, it is often best to defer writing down definition of overall responsibilities until the activities have been analysed and described.

**G. Principal job duties or main tasks** - these should cover the following areas:

1. Identify and produce an initial list of main activities or tasks carried out by the jobholder
2. Analyse the initial list of tasks and group them together, so that no more than about ten main activity areas remain. Most jobs can be analysed into seven or eight areas and if the number is extended much beyond that, the job description will become over complex and it will be difficult to be specific about accountabilities or tasks.
3. Define each activity as a statement of accountability, i.e. what the job holder is expected to achieve (outputs). The emphasis should be on 'what gets done' rather than 'what workers do' as this provides a far more effective description and gives less room for ambiguity. Give a more precise meaning to the activity being described by using terms such 'communicates with', 'explains', 'clarifies', 'discusses' or 'inform'.
4. Define who the jobholder is accountable to in one sentence:
  - Start with a positive indication of what has to be; for example: plans, prepares, produces, implements processes, provides, schedules, completes, dispatches, maintains, liases with, collaborates with etc.
  - Describe what is done as succinctly as possible
  - State briefly the purpose of the activity in terms of outputs or standards to be achieved.

Each item in the job description should relate to 'outputs' that the jobholder will be expected to achieve or produce, and that each should therefore state what the jobholder can be held responsible for. Where a job task is performed under supervision, this should be clearly stated. Any deadlines to work to should be included, or at least acknowledged in the job description.

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## **JOB DESCRIPTIONS (Continued)**

Consider using the following categories. Look at each desirable & essential and expand the content. For example:

**Management** Does your role:

- Influence policy and procedures - locally, trust wide?
- Involve analysing and responding to situations? At what level, locally, trust wide?
- Require budgetary responsibility? - To what level - i.e. complete responsibility or signatory?
- Require you to business plan?
- Involve planning shift rotas and allocating staff on a regular basis?
- Involve recruitment?
- Require you to be responsible for a group of staff and or clients/patients? Is this continuous or shift work related?
- Require risk assessments?
- Require a level of responsibility regarding Health and Safety - what is it?
- Involve using HR policies i.e. investigating disciplinary, grievance etc?

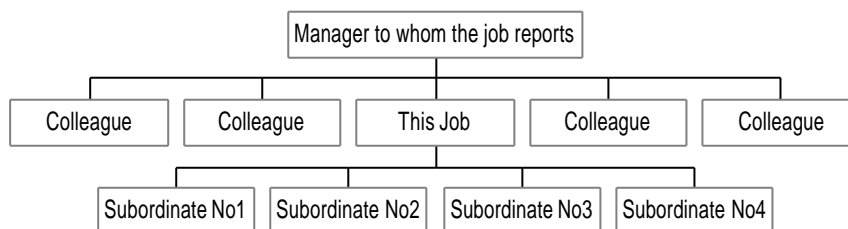
### **Leadership**

Apart from yourself, who are you accountable to?

Does your role require you to;

- Be a team leader? What does this entail?
- Be in charge of your area?
- Manage your own caseload - how large?
- Performance manage and formulate personal development plans? For whom?
- Influence/make and implement changes to your practice, locally or trust wide?

**Consider an organisational chart.**



*This type of chart is sometimes included as a separate attachment to JD*

### **Skills**

What skills are required to undertake the role?

What responsibilities do you hold in assessing/planning/implementing and evaluating client care - supervised or unsupervised?

Does your role require you to;

- Work under supervision?
- Refer to other disciplines/professions unsupervised?
- Advise and recommend treatment (final say)?
- Accept referrals from other disciplines unsupervised?
- Manipulate instruments? How much skill is needed?
- Manually handle patients/heavy objects? Is this a regular/constant feature of the role?
- Be exposed to hazardous/biological substance - frequency?

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## **JOB DESCRIPTIONS (Continued)**

### **Research**

Does your role require you to;

- Undertake research and audit?
- Participate in research?
- Organise workplace trials?

### **Education & Experience**

- What qualifications are required to undertake the role?
- Are you expected to undertake further educational qualifications?
- Do your qualifications require registration?

Remember that the Agenda for Change Job Evaluation scheme measures what qualifications are required to do the job. If you have a qualification not actually required to do the job it doesn't count.

What sort of experience does the role require, for example, would you have had to work in the particular speciality?

What sort of experience required by the job could be transferred / transferable from another job?

### **Training**

Does your role require you to;

- Train staff - who?
- Mentor/facilitate staff and their development?
- Facilitate courses, study days?
- Lead on any in-house forums related to your role
- Under go mandatory training - what?
- Train patients/clients/carers/relatives?
- Undertake health promotion?

### **Communication**

- Who are you expected to interact with on a regular basis, (key working relationships), social services, relatives, patients, clients, other departments/organisations?
- Are there special needs/requirements to ensure communication effective - challenging behaviour, learning disabilities, bereavement. Confidentiality, technology, sensitivity?
- Does your role require you to discuss complex issues - planning , advising others regarding management ?
- Do you participate in meetings locally and/or other organisations?
- What type of records must you maintain?

### **H. Reference to other documents** (such as collective agreements)

**I. Review date** - Where the job description is explicitly incorporated into the contract of employment, it is also wise to state that the content and reporting arrangements may be reviewed and subsequently changed.

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## **PERSON SPECIFICATION**

The person or job specification describes the characteristics (skills, knowledge, experience and qualifications) that are needed to carry out the duties in the job description. It is probably the most valuable tool in the whole of the recruitment and selection process and is used for: -

- writing job advertisements;
- short-listing applications;
- structuring interviews; and
- assisting in the decision making process.

It is not logical to short-list for interview any candidate who fails to meet the requirements of the person specification.

The selection and criteria for a post must be capable of objective justification based on the duties of the post. They must not exclude the appointment of candidates with disabilities where reasonable adjustments are possible.

Key points to consider when writing person specifications:

- a) Unnecessary restrictions, for example, setting educational qualifications which are higher than those actually required to do the job and which a particular group in society may not be able to meet should be avoided as they may lead to Indirect Discrimination occurring;
- b) Criteria should be clearly specified (e.g. be cautious of common phrases used time and again to describe requirements, which contribute to ambiguity);
- c) Criteria should be job related & necessary for the effective performance of the job;
- d) Criteria should be reasonable - e.g. not looking for qualities in the successful candidate which the person doing the job effectively at the moment does not possess;
- e) Emphasise skills and abilities and provide examples of how skills will be used;
- f) Avoid duplicating the job description; and
- g) Consider quality rather than length of experience.

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## **JOB EVALUATION FACTORS**

*(Summarised from national Job Evaluation Handbook, First Edition)*

### **1. RESPONSIBILITIES**

#### **Patient/client care**

Responsibilities for patient/client care, treatment and therapy.

#### **Policy/service development/implementation**

Responsibilities for development and implementation of policy and/or services.

#### **Financial and physical resources**

Responsibilities for financial resources; and physical assets

#### **Human resources**

Responsibilities for management, supervision, co-ordination, teaching, training and development of employees, students/trainees and others in an equivalent position.

#### **Information resources**

Responsibilities for information resources and information systems.

#### **Research and development**

Responsibilities for informal and formal clinical or non-clinical research and development activities underpinned by appropriate methodology and documentation.

#### **Freedom to act**

The extent to which the jobholder is required to be accountable for own actions and those of others, to use own initiative and act independently; and the discretion allowed to the jobholder to take action.

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## **JOB EVALUATION FACTORS (Continued)**

*(Summarised from national Job Evaluation Handbook, First Edition)*

### **2. KNOWLEDGE AND SKILLS**

#### **Communication and relationship skills**

The skills required to communicate, establish and maintain relationships and gain the co-operation of others.

#### **Knowledge, training and experience**

All the forms of knowledge required to fulfil the job responsibilities satisfactorily. This includes theoretical and practical knowledge; professional, specialist or technical knowledge; and knowledge of the policies, practices and procedures associated with the job.

#### **Analytical and judgmental skills**

The analytical and judgmental skills required to fulfil the job responsibilities satisfactorily.

#### **Planning and organisational skills**

The planning and organisational skills required to fulfil the job responsibilities satisfactorily.

#### **Physical skills**

This factor measures the physical skills required to fulfil the job duties.

### **3. EFFORT AND ENVIRONMENT**

#### **Physical effort**

The nature, level, frequency and duration of the physical effort (sustained effort at a similar level or sudden explosive effort) required for the job.

#### **Mental effort**

The nature, level, frequency and duration of the mental effort required for the job (for example concentration; responding to unpredictable work patterns, interruptions and the need to meet deadlines).

#### **Emotional effort**

The nature, level, frequency and duration demands of the emotional effort required to undertake clinical or non-clinical duties that are generally considered to be distressing and/or emotionally demanding.

#### **Working conditions**

The nature, level, frequency and duration of demands arising from inevitably adverse environmental conditions (such as extreme heat/cold, smells, noise, and fumes) and unavoidable hazards (such as road traffic accidents, spills of harmful chemicals, aggressive behaviour of patients, clients, relatives, carers).

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## **SUMMARY OF JOB EVALUATION PROCESS**

**Note: Evaluations will not be undertaken until job descriptions have been agreed and the job evaluators have been trained.**

### **STAGE 1: JOB MATCHING**

Jobs will first be compared against nationally-agreed job profiles that have already been assigned to one of the proposed pay bands on the basis of the national job evaluation scheme. If it is agreed that the job matches a profile, it is assigned the relevant pay band automatically. If it cannot be matched to a profile it will be subject to job analysis (a full local job evaluation) as described in Stage 2 below.

Job matching will be undertaken by a joint panel of trained management and staff representatives (job matchers). It will be based on the job description plus any other relevant information.

If a member of staff is unhappy about the decision, they may ask for another panel to review the decision. There is no further right of appeal.

### **STAGE 2: JOB ANALYSIS (local job evaluation)**

If a job cannot be matched closely enough to one of the national job profiles it will be analysed in more detail and assessed against a range of factors under the full national job evaluation scheme. This will result in a points score which will assign the job to one of the pay bands.

Job analysis will be undertaken by a joint panel of trained management and staff representatives (job evaluators). It will be based on a questionnaire completed by the postholder that is finalised in an interview by a joint team of trained management and staff representatives (job analysts).

If a member of staff is unhappy about the decision, they may ask for another panel to review the decision. There is no further right of appeal.

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<b>THE NHS JOB EVALUATION WORKING PARTY DETAILED MATCHING PROCEDURE</b>
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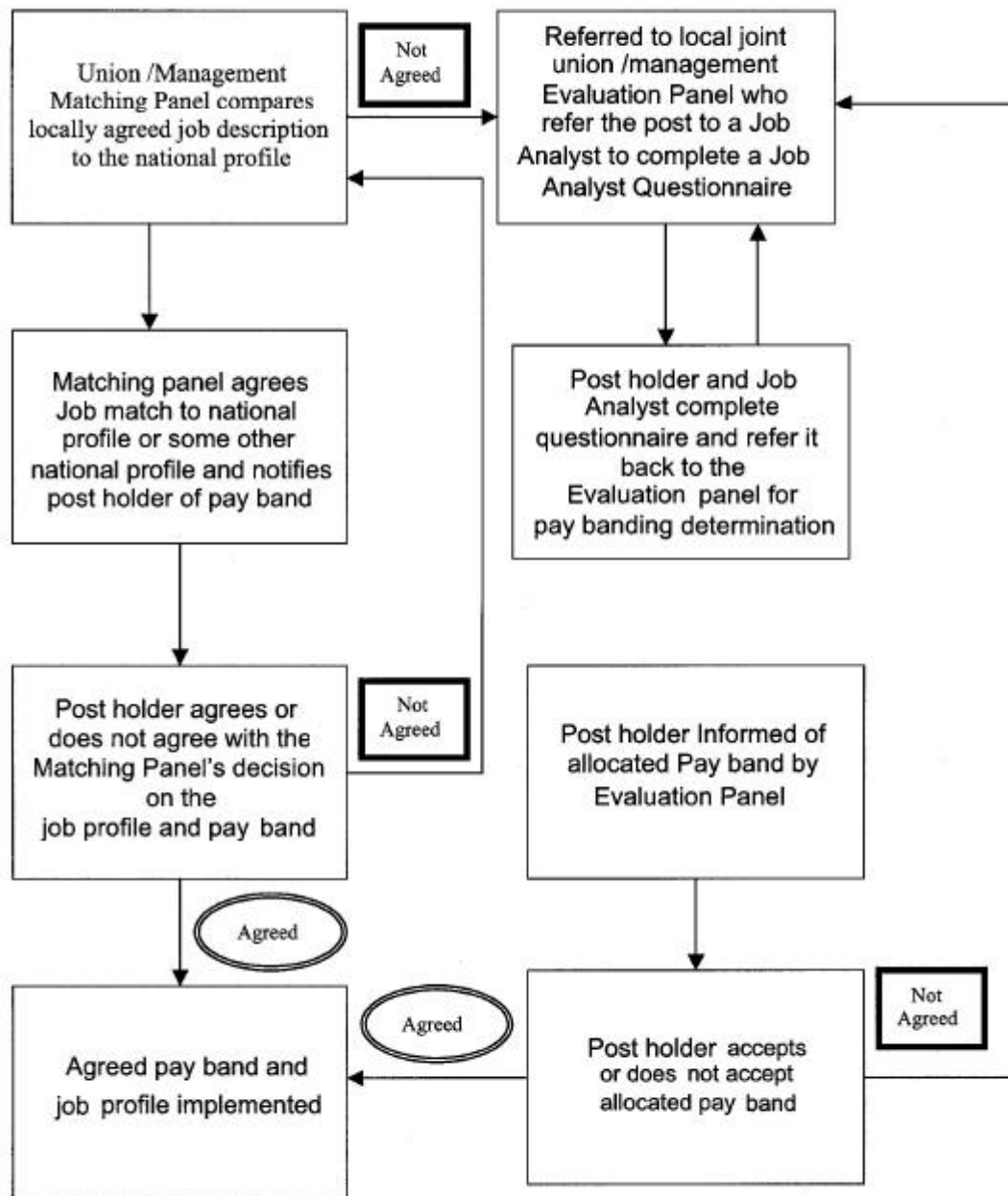
1. **Matching Panel.** For details of composition and procedure for arranging matching panel sessions, see the Job Matching Procedure (Job Evaluation Handbook *p.40-41*). Note that records should be kept of matching panel members and representatives attending each session, together with a list of jobs matched. This is for future reference, in case of the need to convene a differently constituted review panel (see Job Matching Procedure), and to establish a matching audit trail.
2. **Documentation.** Ensure that all relevant documentation is before the Matching Panel. This includes job descriptions for jobs to be matched; and, where available, job specifications, organisation charts, other reference documents.
3. **Step by Step Procedure.** For each job:
  - (a) **identify possible profile matches**, using the (computerised or paper-based) profile index and job titles (there are unlikely to be more than 3 possible matches);
  - (b) **read the job description**, job specification and any other job information and the selected national profiles. Identify what appears to be the nearest profile to match first;
  - (c) **compare the profile job statements** with the job description, job specification and any other available information, including that provided orally by job group advisers/representatives, for the job to be matched. Complete the job statement box on the (computerised or paper-based) matching form;
  - (d) **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;
  - (e) **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”);
  - (f) **record** the profile level in the Profile Level column and the proposed level for the job in the Job Level column, referring to the HES factor levels, as necessary. Where the job level is the same as the profile level or within the profile range, mark M 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).

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<b>THE NHS JOB EVALUATION WORKING PARTY DETAILED MATCHING PROCEDURE (Continued)</b>
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4. **Determine the matching outcome.** Possible outcomes are:
- (a) if all factor levels are within the range specified on the profile, this is a (perfect) Profile Match;
  - (b) 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:
    - (c) the variations are NOT MORE than 1 level above or below the profile level or range; AND
    - (d) 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
    - (e) 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
    - (f) the score variations do not take the job over a grade boundary;
    - (g) 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. 42.43)
5. **When a profile or band match has been achieved**, complete the score column and remaining section of the matching form. Whether or not a match has been achieved, all documentation should be sent to the core panel for consistency review. For approved matches, send copies, together with the relevant profile and a blank matching review form (for those wishing the match to be reviewed to provide additional or alternative information), to all those covered by the match.

# THE MATCHING PROCESS DIAGRAM



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## **GLOSSARY OF TERMS**

<b>A4C</b>	<b>Agenda for Change</b> - The proposed new terms and conditions. The job evaluation scheme. The knowledge and skills framework being proposed for adoption across the whole of the NHS after December 2004. (See DOH website <a href="http://www.dh.gov.uk/Home/fs/en">http://www.dh.gov.uk/Home/fs/en</a> )
<b>J.D.</b>	<b>Job Description</b> - A statement of all the elements of the work carried out or expected of the post holder. Pragmatically all the work that has been done in the last year and can be reasonably expected to be undertaken under a post holders contract.
<b>Person Spec</b>	<b>The Person Specification</b> - A statement usually drawn up to identify suitable candidates for a post and describing attributes and competencies required. This statement will be used in the job evaluation and matching process and should be agreed with managers.
<b>Pay Band</b>	The range of pay points in each part of the new pay scale defined by profile matching.
<b>Job Profile</b>	A generic statement of work based upon the factor plan and levels that it identifies as skills and competence level for each job.
<b>Matching</b>	The comparison of J.D.'s and Person Specs with the generic profiles to establish on which pay band a job best fits.
<b>Clustering</b>	The practice of management and staff in partnership of grouping similar jobs, JD's and Person Specs to aid the matching process. This process is subject to agreement by the post holder.
<b>JAQ</b>	<b>Job Assessment Questionnaire</b> - A detailed questionnaire used by job evaluators to gather information to fit details of job to factors and levels before matching to a profile or to be used to draw up a new profile where no match is possible.
<b>J.E. Factors</b>	Sixteen dimensions that allow description of work and responsibility which are broken into ascending levels. (See JE handbook for detailed definitions on the DOH website).
<b>J.E. Levels</b>	A subdivision of job evaluation factors which relates to details of jobs and responsibilities. (See above)
<b>Assignment</b>	Assignment of a post to a pay band. The process of finding the new pay point on the new pay scale for a given post by use of the matching process.
<b>Supervision</b>	A term specific to the job evaluation scheme meaning the most intensive level of management or continuous surveillance in the range of management observation of a post holders work.

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## **GLOSSARY OF TERMS (Continued)**

### **Complexity / Highly Complexity**

Terms Specific to the JE process and closely defined in the handbook for specific factors and levels. (See Joint Professional Guidance and the Factor Plan).

### **Shadow Executive**

The authority of staff side unions and management that defines and determines the application of the job evaluation scheme.

### **GNC/General Negotiating Council**

The management and staff side body which negotiates & oversees introduction of A4C.

### **Staff Council**

The organisational body which will take on the administration of the new terms and conditions and pay system once Whitely Council passes on this responsibility in 2005.

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