



Job Evaluation Policy and Procedure

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Policy lead	Senior People Partner	
Policy author (if different from above)	As above	
Exec Sign off Signature (electronic)		
Disclosable under Freedom of Information Act 2000	Yes	

Policy context

Birmingham and Solihull Mental Health Foundation Trust (BSMHFT) is committed to the operation of a fair, consistent, and equitable job evaluation scheme, which is in line with our Trust values of Compassionate, Inclusive and Committed. Our values describe our core ethics and principles.

Our Job Evaluation Policy and Procedure sets out the Trust's local arrangements for job evaluation under the national framework of Agenda for Change (AFC).

Our Job Evaluation Policy and Procedure will ensure that the Trust has an effective job evaluation process which meets the needs of the Trust.

Policy requirement

This policy applies to all directly employed Trust staff employed under Agenda for Change (AfC) terms and conditions of service. This policy does not apply to directors, medical posts, and Very Senior Manager Positions (VSM).

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1.0 Rationale (why):

The Job Evaluation Policy and Procedure principles are based on the NHS Job Evaluation Handbook. The key purpose of the Job Evaluation (JE) Policy is to ensure that the Trust is supported by a robust policy and process that will ensure the Trust is able to evaluate, match and regrade roles in a fair and consistent manner. The policy seeks to ensure all JE activities support organisational effectiveness.

This policy and procedure will ensure new posts and roles that have undergone significant changes are appropriately assessed and evaluated or matched in accordance with the NHS Job Evaluation Scheme (JES). The aim is to achieve consistency of job matching and evaluations. This policy and procedure have also been developed to enable the Trust to match and evaluate jobs in an efficient manner, so that managers and employees are supported to deliver services that are patient centred and aligned to our Trust values.

The JE Policy and Procedure will enable a staff member or the manager of a service to have access to an independent review of the band assigned to a post.

Partnership working remains a central principle of Agenda for Change. To uphold this central principle, the Trust will continue to work with Trade Unions (staff-side) colleagues by ensuring that the JE evaluation processes are jointly implemented through equal partnerships in Job evaluation, job matching, consistency checking and other JE related decision-making processes.

Agenda for Change requires fairness and equality in line with equal pay legislation. This continuing requirement will be supported and embedded in all new service development, and all job evaluation and job matching processes. Our Partnership working will continue to support the principles of equal pay.

1.1 Policy

BSMHFT is committed to preventing discrimination, valuing diversity, and achieving equality of opportunity. No person (staff, service users or public) will receive less favourable treatment on the grounds of the nine protected characteristics (as governed by the Equality Act 2010): sexual orientation; gender; age; gender re-assignment; pregnancy and maternity; disability; religion or belief; race; marriage and civil partnership. In addition to these nine, BSMHFT will not discriminate on the grounds of domestic circumstances, social-economic status, political affiliation, or trade union membership.

2.0 Scope (when, where and who):

- This policy applies to all directly employed Trust staff employed under Agenda for Change (AfC) terms and conditions of service.
- This policy does not apply to directors, medical staff, posts of workers not employed by the Trust. The NHS job evaluation scheme covers AfC jobs only and does not include managers in Very Senior Manager (VSM) positions.

2.1 Principles (beliefs):

- The NHS Job Evaluation Handbook sets the protocol in relation to the process of job evaluation and this policy is written in line with the JE Handbook.
- The Trust will typically utilise the policy when recruiting to new posts. In exceptional circumstances, line managers will be given authority to recruit to posts subject to JE process if it is considered there are significant risks to service delivery and to patient safety.
- That partnership working between the Trust and the recognised staff-side will underpin the job evaluation processes.

- That the Trust job evaluation and job matching processes are transparent.

3.0 The procedure

All requests for Job Evaluation must have vacancy approval via the Budget Holder and Finance, for Changed jobs (Re-banding) requests this must also have endorsement from the relevant Associate Director before being submitted for Job Evaluation.

All requests for job matching, for changed jobs requests (re-banding) and all general queries about job evaluation must be sent to the job evaluation in box using this email address:

bsmhft.job.evaluation@nhs.net. Managers will be notified of the outcome of the job evaluation panel within 5 working days.

Where a National Profile exists, then that profile must be used. In these circumstances the role will not require formal job matching. The line manager must seek advice from the People Team to confirm that the appropriate JD/PS has been used. This information must be sent to the JE administrator to upload onto IJES. The manager can then proceed to recruit to their vacancy.

The Trust may use other neighbouring Trust job descriptions where the role has been matched within two years, supporting evidence i.e., related documents, job matching /evaluation outcomes must be obtained. Where this is the case, the manager must discuss with a member from the People Team to ensure there are no discrepancies.

3.1 New Posts – prior to recruitment

The recruiting manager will be responsible for drafting a comprehensive job description and person specification which accurately reflect the duties required of the post and the skills and abilities required of the person in the post. Managers should seek advice from the People Team on the quality of the job description and to ensure that the template and format are correct prior to submitting the job description and person specification for job evaluation. (**Appendix 2**)

Once complete, the job description and person specification and signed Job Evaluation Request Form (Appendix 3) should be submitted using this email address bsmhft.job.evaluation@nhs.net. The job description and person specification where possible will be scheduled for the next available Job Evaluation Panel.

3.1.1 Mergers and reconfiguration of services

Where there has been mergers and reconfiguration of services, the Trust will treat all employees joining the Trust as being 'in the same employment for the purpose of equal Pay. To avoid any inconsistencies or significant differences in the way job evaluation or job matching might have implemented, it will be good practice, at the earliest opportunity following the merger and reconfiguration of a service or services, the Trust will review and consistency check evaluations, revisiting and if necessary, re-evaluating where inconsistencies cannot be objectively justified.

3.1.2 Review of the JD/PS

Once a JE has been completed and after a period of 6-12 months the Line Manager may wish to review the job with the postholder.

The job description and person specification should be reviewed by the line manager with the postholder to determine whether it still truly reflects the role being undertaken or whether any changes need to be made. If there are no significant changes then the employee will continue to perform their duties in accordance with the existing Job description and person specification.

Where there are significant changes, advice must be sought from a member of the People Team. If the changes are significant, this is likely to be a Changed Job (**see point 3.5 for dealing with changed jobs or (rebanding)**).

Where there are more than one postholder, then arrangements should be made by the postholders for a suitable member of staff to be responsible for conveying the opinions of the rest of the postholders and for agreeing the job description and person specification.

3.2 Pre-sift for the Matching process.

The assigned Job Evaluation Panel are required to review all relevant documentation in advance of the JE panel and sift through Published National Profiles and select appropriate National Profiles to be used by the Job Evaluation Panel for the relevant job type. (This must be done during protected time allocated for Job matching duties). All the relevant documents will be uploaded on the IJES system which all panel members have access to. The JE administrator will provide login details to the IJES system to all panel members.

3.3 Evaluation process

3.3.1 Arrangements for job matching/evaluation/ composition of panels

A JE panel will always consist of four panel members, two staff side and two management representatives. In the event where one panel member is unable to join the panel for emergency reasons, the remaining three panel members will decide if they are able to proceed with the job evaluation process. In such situation, the three panel members will compose of two management representatives and one staff-side or vice versa if agreed by the three panel members.

All panel members must be trained in Job Evaluation as appropriate by the Job Evaluation Handbook. New members must sit on one panel to observe before they proceed to participate on JE or job matching panel.

Job matchers will be required to provide their availability three months in advance and support a minimum of two panels per calendar month. Any panel member who is unable to attend an arranged panel meeting must inform the JE administrator at least one week before the scheduled panel meeting date to allow sufficient time to find another panel member to sit on the scheduled panel.

3.3.2 Administration

The JE administrator will carry out all preparatory work to ensure that the correct paperwork is ready and available on the IJES system prior to the Panel session (i.e., the Job Description, Person Specification, Organisational Chart). The JE administrator will make managers aware of the time and dates of panels in order that managers can make themselves available by telephone/ Microsoft Teams should the panel have any queries or need to seek points of clarification.

3.3.3 Panel Discussions/ Decisions

All discussions during the Job evaluation panel meeting must remain strictly confidential. The panel must reach consensus in their decision on the factor level and the rationale for each factor.

The panel must reach their final decision on each factor to allow a 'profile match/band match.' or to complete the evaluation. Once consensus has been reached the panel members must stand by their decision and document their decision. If the panel need to ask any questions to help them decide, they should agree all the questions they require answers to before contacting The People Team or the Line Managers. If clarification is sought, the information gathered, including any advice given should be documented.

3.3.4 Panel Results

Job evaluation and Job matching Panel results must not be released to the postholder(s) or the line manager until the JE Panel have completed the job matching or job evaluation and agree that the outcome can be released. The Band of the post will then be applied to the job type and will include all postholder currently undertaking those duties.

3.3.5 Consistency checking

To avoid local banding anomalies and consequent review requests, suitably trained and experienced management representative, and staff side representative will carry out regular consistency checks internally against local matching and evaluations, external checks will also be carried out against national benchmark evaluations to avoid jobs getting 'out of line' with similar like for like jobs. The process for consistency checking is in **appendix 4**.

3.3.6 Job Analysis Questionnaire (JAQ)

If there has been an unsuccessful attempt to match to one or more national profiles or where there is no potential national profile available to match due to the post being unique or significantly different, the post will be referred for a JAQ.

- A draft Job Analysis Questionnaire (JAQ) must be completed by a jobholder(s) seeking advice from colleagues, a supervisor or line manager.
- A jobholder, or a jobholder representative of the post along with a line manager, will then be interviewed by two trained job analysts, one from management side and one from staff side to check, amend if necessary and verify the JAQ. (A jobholder representative, if representing a group of staff may be accompanied by another jobholder for support if they so wish).
- Once agreed, the JAQ is signed off by the jobholder, line manager and both job analysts. The agreed and signed off JAQ is evaluated by a joint evaluation panel, with the rationale and results for each factor entered onto the recording system.

3.3.7 Recording Information for Matching/Evaluation

During the JE panel meeting, the panel will elect a panel member to record information on the IJES system, this will include all the levels for each factor must be accurately completed with all relevant rationale information.

The JE Administrator will ensure all information is fully completed as required (i.e., panel member name, dates, job title). The information recorded onto the system will be made available to the elected panel to check the details for accuracy and completeness.

3.4 Reviews

If any individual or group of staff feel that the results do not reflect their role, they may request a review, they must do so as follows:

- The review request is made within one month of notification of the original panel's banding decision. (Appendix 4)
- The postholder(s) provides details in writing of where they disagree with the evaluation.
- The postholder(s) must provide additional relevant job-related evidence to support their case for a review and have this agreed by an appropriate manager.

A review is not permitted purely on the basis that the line manager or postholder is not happy with the outcome. Failure to provide documentary evidence will prevent the review from proceeding.

The request for a review and the supplementary evidence should be sent to the bsmhft.job.evaluation@nhs.net. The review panel should be made up of a majority of different members from that of the original panel, working in partnership and must have a minimum of three panel members which must compose of staff side and management representatives.

Postholders should be aware that it is possible for bands to go up or down because of this process.

If the postholder can demonstrate that the process was misapplied, they may pursue a local grievance about the process, but not against the match/evaluation and pay band decision.

3.5 Changed jobs (re-banding) – application.

If an individual (or group) believes that their role has significantly changed they should approach their line manager to discuss the significant changes to their role by indicating the changes in their current job descriptions and person specification using track changes to show the changes. Where there is a changed job request, support and advice must always be sought from a member of the People Team prior to any formal submission request for job evaluation is made.

Once there is consensus that there are significant changes, all the relevant information must be submitted along with the Job Evaluation Request Form to bsmhft.job.evaluation@nhs.net for consideration by a JE panel.

If there is an increase in the job band due to this process, back dating of any pay increases will be from the date of the **outcome of the JE panel**.

If an individual (or group) is unable to get the agreement of their line manager that their post has changed, they should contact a People Team representative who will organise a meeting to resolve the issue. If no agreement can be reached, the individual has the right to pursue matters under the Trust's Grievance Policy.

It should be noted that where an individual has undertaken additional duties for the purpose of personal development, the original post is unaltered, and the post will not be considered for rebanding. The individual may choose to discontinue the performance of such duties, or such duties may be withdrawn by the line manager following discussion.

A revised job description cannot be submitted for at least twelve months from the date of notification of the outcome to the line manager except where there is clear evidence that service needs have changed significantly which impact on the post or where a job description has changed following the 6-12month bedding in period for a new post.

If the post is being re-banded due to service redesign/organisational change and the expectation is a lower banding outcome managers should also refer to the **Organisational Change Policy**. Consultation should take place between the manager and postholder(s) on the content of the job description/person specification prior to the job being banded.

If the post comes out at a lower band than was first agreed, the postholders will be subject to pay protection (refer to **Organisational Change Policy**).

3.6 Appeals Process- appeal against Changed jobs.

Where the post holder disagrees with the outcome of the Changed job request (Re-band evaluation), they may submit an appeal. This appeal will be submitted to a second panel, of which members will be different from the first panel. (**appendix 4**)

An appeal would need to be submitted to bsmhft.job.evaluation@nhs.net within one month of being notified of the outcome of the initial review. This appeal must be signed by both the post holder and their line manager and indicate the factors which they believe were not considered by the initial panel.

The decision of the second panel is final, and there is no further right of appeal. Appeals will not be accepted out of time, unless due to exceptional circumstances.

If the appeal results in a change to the pay band, then the effective date will be the date of submission of the appropriate paperwork.

3.7 Pay increases.

In the event of an upgrade, pay should be set at either the minimum of the new pay band, or, if this would result in no pay increase, the first point in the band which would deliver an increase in pay

(by reference to basic pay plus any recruitment and retention premium if applicable). For further details please discuss with a Senior People Partner or People Partner.

3.8 Training requirements

A register of all names of trained practitioners will be maintained to ensure consistency and continuity of JE processes in the Trust. Trained practitioners will be encouraged to participate in refresher and consistency checking training on a regular basis.

The training available are:

1. **'Job Matching'** - this is a 2-day course which teaches practitioners how to accurately match jobs to the relevant profiles.
2. **'Job analysis and job evaluation'** - a 2-day national course. To complete this course, the individual is required to have completed the job matching course before attending this course.
3. **'Consistency checking'** - this is a one-day course. You are required to do the job matching and job analysis and job evaluation course. The consistency checking course is essential for the Management and staff side leads.

4.0: Responsibilities

This should summarise defined responsibilities relevant to the policy.

Post(s)	Responsibilities
The Head of People and Culture	They will have overall line management responsibility for the operation and implementation of the Job Evaluation Policy and Procedure.
Partnership working	<p>The Trust recognises the importance of partnership working it will therefore share the ownership for job evaluation processes with the Recognised Staff -side through the identification of two Job Evaluation Leads, one management and one staff - side. The Job Evaluation Leads would have knowledge of the Job Evaluation Scheme and will:</p> <ul style="list-style-type: none"> ○ Ensure that NHS Staff Council good practice guidelines are followed. ○ Advise employees, managers, and staff -side about job evaluation good practice. ○ Ensure there are adequate numbers of trained individuals to match and evaluate jobs. ○ Advise managers and employees that new and significantly changed jobs should be matched or evaluated. ○ Keep up to date with job evaluation developments and share recommended practices when necessary. ○ Ensure job evaluation continues to be relevant to the Trust and therefore help to protect the Trust against equal pay challenges.
Consistency Panel	<p>Through this policy a consistency panel to be trained and formed. The Panel will compose of Staff side and Management representative.</p> <p>It will be the responsibility of the Consistency Panel to:</p> <ul style="list-style-type: none"> ○ To ensure they have been on the training before conducting consistency checks. ○ Ensure outcomes are checked against other local job matches within the same occupational group, job family and other local job matches within the same pay band. ○ Consider the matching panel outcome and either confirming the match to a national profile or non-match depending on the profile used and the number of factors which vary. ○ Check the consistency of matching outcomes against other roles within the same occupational group, job family and other local matches within the same pay band. ○ Check the national profile selected and the overall score within the band range and each matching factor for variations and any inconsistencies in scoring against the

	<p>evidence provided in the job description. The consistency panel should not rematch the job description.</p> <ul style="list-style-type: none"> ○ Record the outcome and any inconsistencies, noting action required i.e., refer to matching panel for review or to the line manager if the issue is with the content of the job description.
<p>Trained Job Evaluators/Matchers</p>	<p>It is the responsibility of trained job evaluators/matchers to:</p> <ul style="list-style-type: none"> ○ Work in partnership to evaluate/match jobs fairly and in accordance with the AFC Job Evaluation Scheme. ○ Maintain confidentiality about all aspects of work undertaken as panel members. ○ Commit to participate in panel meetings and to attend panels to which they have given a commitment. ○ Complete the required documentation accurately, clearly, and comprehensively. ○ Referring to the contact details provided to ask questions for clarification if required and to record the profiles considered and the profile matched to. ○ Recording the evidence used for each factor score and the details of any questions and answers.
<p>Service/General Managers</p>	<p>It is the responsibility of the head of service/general manager to:</p> <ul style="list-style-type: none"> ○ Ensure that changed job roles meet the needs of the business and the Trust's strategic objectives. ○ Consider when making changes that the banding of both jobs may be affected when a change of responsibilities for one job impacts on the responsibilities of another. ○ Ensure the quality of the job descriptions, job specifications and supporting documentation meet the Trust standards before being presented for banding.
<p>Line Manager</p>	<p>It is the responsibility of the Line Manager to:</p> <ul style="list-style-type: none"> ○ Ensure that the design of roles reflects the Trust's strategic objectives, the needs of the business and safety of all patients and can deliver a cost-effective healthcare. ○ Consider the needs of the business when considering a significant change to a job role. ○ Ensure that the job descriptions of post holders fairly reflect the principal duties required of them. ○ Provide the necessary information to describe the duties and responsibilities of the role (it is unacceptable to copy/paste information from national profiles into job descriptions without providing relevant examples; these should be tailored to the specific local role). ○ Confirm and indicate the title of the job, the name of department and team the job is based and the structure chart. Not to indicate on the job description the banding that they are seeking. ○ Ensure that re-banding applications (outside of an organisational change process) are discussed with post holders. This will include having an open and frank discussion with the post holder about what will happen if the outcome of the evaluation indicates the job description is at a higher band. <p>If there is not a budget to sustain a higher banded post it will</p>

	<p>be necessary for the line manager to explain to the post holder that the next step will be to review the job description further to bring the duties back in line with the original pay band.</p> <ul style="list-style-type: none"> ○ To ensure that re-banding applications have input from the relevant senior manager and that the necessary paperwork including senior manager approval is completed before submission to the job evaluation team. ○ Obtain approval in principle from the head of service/general manager for any proposed changes to banding before discussion with job holders. ○ Ensure that job descriptions and person specifications are accurate, complete, meet the needs of the service and are written in line with the Trust's standard template (See Appendix 2). ○ Be available by phone on the date the job-matching panel is taking place to answer panel questions. – ○ Notify staff of the outcome in writing with a copy placed on the personal file. ○ To inform ESR Team/Payroll where a change of banding is approved.
Employees	<ul style="list-style-type: none"> ○ It is the responsibility of employees to ensure that their requests for re-banding are submitted in accordance with this policy and procedure. ○ To ensure that a re-banding application is discussed with their line manager and the necessary paperwork is completed before submission to the job evaluation administrator.
People Team/ Job Evaluation (JE) Administrator	<ul style="list-style-type: none"> ○ Maintain and continuously improve effective documentation and systems to evidence compliance with the job evaluation process and support an auditable process. ○ Where possible, ensure that all job descriptions are fit for purpose for job evaluation. ○ Support JE Leads to ensure that all new panel members receive national job evaluation and JAQ training and that other panel members receive refresher training as necessary. ○ Maintain a list of all the trained evaluators and matchers. Coordinate and provide a rota of job matching dates (where possible arrange at least three-monthly panel meetings). ○ Share the panel rota dates with line managers who have jobs to be matched or re-banded. ○ To ensure where a panel member is not able to match because of conflict of interest, they should declare this and swap with another panel member ahead of the date of the panel meeting. ○ Provide appropriate guidance to managers about the job evaluation process. ○ Administer the procedure including providing the documentation to the JE Panels. ○ Inform the line manager of the JE outcome. ○ Ensure JE records are saved and retrievable from the data system.
Executive Director	Strategic accountability for ensuring there is compliance with this Policy and that it is applied in a fair and consistent manner.

	To ensure the policy is implemented and cascaded throughout the Trust.
Trust Board	Overall responsibility for developing and maintaining a fair and consistent implementation of the policy.

5.0: Development and Consultation process:

Consultation summary		
Date policy issued for consultation	16.3.22	
Number of versions produced for consultation	2	
Committees / meetings where policy formally discussed	Date(s)	
Where received	Summary of feedback	Actions / Response
JOSC		
Policy Review Workshop		
Transforming our Culture and Staff Experience Sub Committee		

6.0: Reference documents and Trust Policies

Trust Grievance and Disputes Policy

Trust Management of Organisational Change Policy

NHS Terms and conditions of Employment Handbook

<https://www.nhsemployers.org/publications/tchandbook>

<https://www.nhsemployers.org/articles/job-evaluation-group-advice>

<https://www.nhsemployers.org/publications/nhs-job-evaluation-handbook>

7.0: Bibliography:

N/A

8.0: Glossary

8.1 Job Evaluation

The means of determining pay bands for posts

8.2 National Job Profiles

National job profiles have been developed and apply to particular staff groups such as administrative and clerical, nursing and allied health professionals allowing jobs to be evaluated to determine the band outcome; they are not intended to be used as job descriptions. National profiles can be accessed at www.nhsemployers.org

8.3 Bench marking

A comparison analysis of job evaluation factors between the job description submitted and another similar job description which has already been formally matched and consistency checked to confirm the same outcome.

8.4 Job Analysis Questionnaire (JAQ)

In very exceptional circumstances, jobs which fail to match a national profile or where there is no national profile exists; the line manager will be required to complete a detailed JAQ with a trained practitioner.

9: Audit and Assurance:

Element to be monitored	Lead	Tool	Frequency	Reporting Committee
Number of jobs that are appealed.	The Job Evaluation Leads	Audit Report	Bi-annual	Workforce Committee
Number of jobs evaluated/ matched /regraded and are deemed inconsistent.				

Appendix 1:

Equality Analysis Screening Form

A word version of this document can be found on the HR support pages on Connect
<http://connect/corporate/humanresources/managementsupport/Pages/default.aspx>

Title of Proposal		Job Evaluation Policy & Procedure		
Person Completing this proposal		Lucretia De Veer	Role or title	People Partner (Resourcing)
Division		People	Service Area	Resourcing
Date Started		30/09/21	Date completed	
Main purpose and aims of the proposal and how it fits in with the wider strategic aims and objectives of the organisation.				
The purpose and aim of the Job Evaluation Policy and Procedure is to set out the Trust's local arrangements for job evaluation under the national framework of Agenda for Change. It will ensure that the Trust has an effective job evaluation process which meets the needs of the Trust. It will provide a systematic process of determining the relative value of different jobs in the Trust. It will ensure the Trust has a pay structure that is fair, equitable, and consistent for everyone.				
Who will benefit from the proposal?				
This policy applies to all directly employed Trust staff employed under Agenda for Change (AfC) terms and conditions of service.				
Impacts on different Personal Protected Characteristics – Helpful Questions:				
<i>Does this proposal promote equality of opportunity?</i>		<i>Promote good community relations?</i>		
<i>Eliminate discrimination?</i>		<i>Promote positive attitudes towards disabled people?</i>		
<i>Eliminate harassment?</i>		<i>Consider more favourable treatment of disabled people?</i>		
<i>Eliminate victimisation?</i>		<i>Promote involvement and consultation?</i>		
		<i>Protect and promote human rights?</i>		
Please click in the relevant impact box or leave blank if you feel there is no particular impact.				
Personal Protected Characteristic	No/Minimum Impact	Negative Impact	Positive Impact	Please list details or evidence of why there might be a positive, negative or no impact on protected characteristics.
Age	X			There is no evidence that staff can be disproportionately affected as a result of their age
Including children and people over 65 Is it easy for someone of any age to find out about your service or access your proposal? Are you able to justify the legal or lawful reasons when your service excludes certain age groups				

Disability	X			There is no evidence that staff can be disproportionately affected as a result of their disability
Including those with physical or sensory impairments, those with learning disabilities and those with mental health issues Do you currently monitor who has a disability so that you know how well your service is being used by people with a disability? Are you making reasonable adjustment to meet the needs of the staff, service users, carers and families?				
Gender	X			There is no evidence that staff can be disproportionately affected as a result of their gender.
This can include male and female or someone who has completed the gender reassignment process from one sex to another Do you have flexible working arrangements for either sex? Is it easier for either men or women to access your proposal?				
Marriage or Civil Partnerships	X			There is no evidence that staff can be disproportionately affected as a result of their Marriage or Civil Partnership
People who are in a Civil Partnerships must be treated equally to married couples on a wide range of legal matters Are the documents and information provided for your service reflecting the appropriate terminology for marriage and civil partnerships?				
Pregnancy or Maternity	X			There is no evidence that staff can be disproportionately affected as a result of their Pregnancy or Maternity
This includes women having a baby and women just after they have had a baby Does your service accommodate the needs of expectant and post natal mothers both as staff and service users? Can your service treat staff and patients with dignity and respect relation in to pregnancy and maternity?				
Race or Ethnicity	X			There is no evidence that staff can be disproportionately affected as a result of their Race or Ethnicity
Including Gypsy or Roma people, Irish people, those of mixed heritage, asylum seekers and refugees What training does staff have to respond to the cultural needs of different ethnic groups? What arrangements are in place to communicate with people who do not have English as a first language?				
Religion or Belief	X			There is no evidence that staff can be disproportionately affected as a result of their Religion or Belief
Including humanists and non-believers Is there easy access to a prayer or quiet room to your service delivery area? When organising events – Do you take necessary steps to make sure that spiritual requirements are met?				
Sexual Orientation	X			There is no evidence that staff can be disproportionately affected as a result of their Sexual Orientation

Including gay men, lesbians and bisexual people Does your service use visual images that could be people from any background or are the images mainly heterosexual couples? Does staff in your workplace feel comfortable about being 'out' or would office culture make them feel this might not be a good idea?				
Transgender or Gender Reassignment	X			There is no evidence that staff can be disproportionately affected as a result of their Transgender or Gender Reassignment
This will include people who are in the process of or in a care pathway changing from one gender to another Have you considered the possible needs of transgender staff and service users in the development of your proposal or service?				
Human Rights	X			There is no evidence that staff can be disproportionately affected as a result of their Human Rights. It is expected that both Staff-side and Managers will implement this policy in a fair and consistent manner.
Affecting someone's right to Life, Dignity and Respect? Caring for other people or protecting them from danger? The detention of an individual inadvertently or placing someone in a humiliating situation or position?				
If a negative or disproportionate impact has been identified in any of the key areas would this difference be illegal / unlawful? I.e. Would it be discriminatory under anti-discrimination legislation. (The Equality Act 2010, Human Rights Act 1998)				
	Yes	No		
What do you consider the level of negative impact to be?	High Impact	Medium Impact	Low Impact	No Impact
				X
If the impact could be discriminatory in law, please contact the Equality and Diversity Lead immediately to determine the next course of action. If the negative impact is high a Full Equality Analysis will be required.				
If you are unsure how to answer the above questions, or if you have assessed the impact as medium, please seek further guidance from the Equality and Diversity Lead before proceeding.				
If the proposal does not have a negative impact or the impact is considered low, reasonable or justifiable, then please complete the rest of the form below with any required redial actions, and forward to the Equality and Diversity Lead .				

Action Planning:
How could you minimise or remove any negative impact identified even if this is of low significance?
No impact has been identified, however, there will be consistency checks to ensure we monitor the possibilities of any negative impacts.
How will any impact or planned actions be monitored and reviewed?
As above
How will you promote equal opportunity and advance equality by sharing good practice to have a positive impact on other people as a result of their personal protected characteristic.
Having joint panels, consistency checks and partnership working with Staff -side and management ensures equality is maintained in this process.
Please save and keep one copy and then send a copy with a copy of the proposal to the Senior Equality and Diversity Lead at bsmhft.hr@nhs.net . The results will then be published on the Trust's website. Please ensure that any resulting actions are incorporated into Divisional or Service planning and monitored on a regular basis.



BIRMINGHAM AND SOLIHULL MENTAL HEALTH NHS FOUNDATION TRUST

JOB DESCRIPTION

Job Title:

Grade:

Reporting to:

Accountable to:

Location:

Job Purpose:

Job Summary:

Organisation Chart:

Key Communications and Working Relationships

Internal

External

Principle Duties and Responsibilities

General

Confidentiality

It is a condition of employment that staff will not disclose any information obtained in the course of their duties other than to those entitled to receive it. The post holder must ensure that the confidentiality of personal data remains secure and the terms of the Data Protection Act and relevant trust policies are met in respect of information held on the Trust's computerised systems.

Equal Opportunities

The Trust is committed to equality of opportunity. All staff are required to comply with current legislation, trust policies and guidance good practice and the NHS Executive's Planning & Priorities Guidance 1996/7.

Conduct

It is expected that all employees will conduct themselves and represent the Trust in a responsible manner and comply with all policies and procedures;

Risk Management and Health & Safety

The post-holder will ensure compliance with the Trust's Risk Management policies and procedures; these describe the Trust's commitment to risk management, the recognition that our aim is to protect patients, employees and visitors from harm, and stress that all employees have a responsibility to minimise risk. The post-holder will be required to observe local Health & Safety arrangements and take reasonable care of him/herself and the persons that may be affected by his/her work;

Safeguarding

All members of employees have a duty to safeguard and promote the welfare of vulnerable adults, children and young people in all relevant areas of their work. This will include any timely attendance at relevant training events and compliance with the Safeguarding Procedures;

Training, Education and Development

All employees have a responsibility to participate in regular appraisal with their manager and to identify performance standards of the post. As part of the appraisal process every employee is responsible for participating in identifying his or her own training and development needs to meet their KSF outline;

Research and Development

Research and development is at the heart of providing effective treatment and high quality services, supporting a culture of evidence based practice and innovation amongst employees. All employees have a duty to be aware of and comply with their responsibilities for research governance, whether as researchers, as part of the team caring for those participating in research or as research participants themselves;

Control of Infection

All employees whether clinical or non-clinical are required to comply with the Health and Social Care Act 2008: Code of Practice for health and adult social care on the prevention and control of infections and related guidance;

Therefore the post-holder is expected to keep patients, visitors, themselves and other employees safe by continuously reducing the risk of healthcare associated infections;

As a manager the post holder is required to ensure that infection control responsibilities are clearly identified, allocated and understood within your team and that appropriate resource, training and support is provided to ensure that they are compliant with Trust policies and procedures on Infection Control and Hygiene;

As a manager the post holder is required to ensure that employees are supported in attending the necessary training and on-going professional development to support their responsibilities and ensure full awareness of infection control and hygiene;

Governance Standards

Comply with the relevant Governance Standards applicable to the Trust as communicated to the post-holder from time to time;

Records Management

Maintain Trust and patient records (both paper and electronic) in accordance with Trust policies to facilitate clinical care and effective administration;

Freedom of Information

Provide advice and assistance to all persons who propose to make, or have made requests for information, and to ensure all requests for information are managed appropriately in accordance with Trust Freedom of Information procedures;

Standards of Professional and Business Conduct

The post-holder will be required to comply with the Trust's Standing Orders and Stranding Financial Instructions, and at all times deal honestly with the Trust, with colleagues and all those who have dealings with the Trust, including patients, relatives and suppliers. The post-holder will also be required to comply with the Code of Conduct for NHS Managers and/or the relevant professional Codes of Conduct;

Data Protection

Comply with Trust Policies and the Data Protection Act in all respects, with particular relevance to the protection and use of personal and patient information;

Security

Comply with Trust policies to ensure there is a safe and secure environment that protects patients, employees and visitors and their property, and the physical assets and the information of the organisation;

Smoking

The Trust operates a No Smoking Policy.

Mobility

This is a Trust Wide appointment and travel around the Trust may be required;

Flexibility

BSMHFT is currently working in a climate of great change within the NHS. It is therefore expected that all employees will develop flexible working practices both within the Trust on a cross-directorate basis, and across Trust's and other organisations to meet the challenges and opportunities of working within the new NHS, which could include taking on new and changing responsibilities, according to the needs of the directorate;

This job description is a reflection of the current position and a summary of the key tasks and may change in light of the developing organisation and in consultation with the post holder. It is the practice of the Trust to regularly examine employees' job descriptions and to update them to ensure that they relate to the job being performed or to incorporate whatever changes are being proposed. This procedure is jointly conducted by each manager and those working directly to him or her. You will therefore be expected to participate fully in such discussions and in connection with them and to help re-write your job description to bring it up to date if this is considered necessary or desirable. The aim is to reach agreement on reasonable changes, but if agreement is not possible the Trust reserves the right to insist on changes to your job description after consultation with you;

Work will be managed rather than supervised;

Environment

BSMHFT is a major NHS Trust and we pride ourselves in the unique environment which exists for all employees. An environment where innovation is encouraged, hard work rewarded, and where our employees play an inclusive role in new developments;

Health and Safety

Staff must ensure that they are familiar with the requirements of the Health and Safety at Work Act (1974), the Trust's Health & Safety policies/codes of practice or regulations applicable to the work place.

Birmingham and Solihull Mental Health Foundation NHS Trust is a major NHS Trust located conveniently to the centre of Birmingham, as a Trust we pride ourselves on the unique environment, which exists, for all our staff.

An environment where innovation is encouraged, hard work rewarded and where our staff, play an inclusive role in new developments.

This job description is indicative only, and the post will continue to evolve as the Trust's priorities develop. It will therefore be revised in consultation with the post holder from time to time and not less than annually. You may also be required to provide cover in other areas following appropriate discussion.

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Additional Information

Job Description Agreement

Budget Holder	Signature
	Name
Post Holder	Signature
	Name
Date	

Birmingham and Solihull Mental Health NHS Trust is a major NHS Trust located conveniently to the centre of Birmingham, as a Trust, we pride ourselves on the unique environment, which exists, for all our staff.

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BIRMINGHAM & SOLIHULL MENTAL HEALTH FOUNDATION NHS TRUST

PERSON SPECIFICATION

Location:	Department:
Post Title:	Grade:

Attributes	Essential	Desirable	How Identified
Training & Qualifications			

Experience			
Skills/Knowledge			
Personal Qualities			

Appendix 3

Job Evaluation / Changed job (Re-banding) Request Form

Job Title of the position seeking JE):	
Directorate:	Area/Dept./Section/Ward:
Name of Post holder (if applicable)	Current Banding
Please indicate reason for re-evaluation	
Re-evaluation of occupied post <input type="checkbox"/>	
Re-evaluation of vacant post <input type="checkbox"/>	
Please indicate the effective date of the change as agreed by the post-holder and manager	
Please state main reason for request (i.e. additional responsibilities, departmental changes)	
Please identify details of comparable roles within the Trust:	
Documentation Checklist (incomplete or missing information may result in delays)	
Revised job description <input type="checkbox"/>	
Revised person specification <input type="checkbox"/>	
Updated Departmental structure chart <input type="checkbox"/>	
Original Job description <input type="checkbox"/>	
Original person specification <input type="checkbox"/>	
Supporting Documentation (if applicable) <input type="checkbox"/>	
Statement of Agreement: <i>Line manager(if applicable) and member(s) of staff must sign this form to indicate joint agreement that the submitted job description and person specification are as accurate reflection of the key skills, requirements and responsibilities of the role.</i>	
Please highlight the main changes to the role:	
Please indicate which specific factors you feel have been affected by the changes to the role.	
1. Communication	<input type="checkbox"/>
2. Knowledge training and experience	<input type="checkbox"/>
3. Analytical	<input type="checkbox"/>
4. Planning & Organisation	<input type="checkbox"/>
5. Physical skills	<input type="checkbox"/>
6. Patient care	<input type="checkbox"/>
7. Policy & Service development	<input type="checkbox"/>
8. Finance & physical resources	<input type="checkbox"/>
9. Human resources	<input type="checkbox"/>
10. Information	<input type="checkbox"/>

11. Research & development	<input type="checkbox"/>
12. Freedom to Act	<input type="checkbox"/>
13. Physical effort	<input type="checkbox"/>
14. Mental effort	<input type="checkbox"/>
15. Emotional	<input type="checkbox"/>
16. Working conditions	<input type="checkbox"/>
Authorised by AD/Director of Nursing /Head of Department Sign..... Print..... Finance Authorisation Sign Print Date	
People Department only Date JE1 received Responsible People Consultant Date of JE	

Appendix 4: Job Evaluation Appeal/Review form

Job Title of the position seeking JE):	
Directorate:	Area/Dept/Section/Ward:
Name of Post holder (if applicable)	Current Banding
Please state grounds for appeal/Review (please attach supporting documentation)	
Please indicate which specific factors you feel have been affected by the changes to the role.	
1. Communication	<input type="checkbox"/>
2. Knowledge training and experience	<input type="checkbox"/>
3. Analytical	<input type="checkbox"/>
4. Planning & Organisation	<input type="checkbox"/>
5. Physical skills	<input type="checkbox"/>
6. Patient care	<input type="checkbox"/>
7. Policy & Service development	<input type="checkbox"/>
8. Finance & physical resources	<input type="checkbox"/>
9. Human resources	<input type="checkbox"/>
10. Information	<input type="checkbox"/>
11. Research & development	<input type="checkbox"/>
12. Freedom to Act	<input type="checkbox"/>
13. Physical effort	<input type="checkbox"/>
14. Mental effort	<input type="checkbox"/>
15. Emotional	<input type="checkbox"/>
16. Working conditions	<input type="checkbox"/>
Statement of Support: The Line Manager must enter their name in the space provided to indicate their support to request an appeal	
Name of line manager	
Date	
People Team use only	
Date form received:	
Date of JE Appeal Panel.	

Appendix 5

The consistency checking process is as follows:

- Any apparent inconsistencies in matching should be referred to the job matching panel with any queries and/or comments. The consistency checkers should NOT substitute their own decision. The original panel should then review the match or evaluation in question and answer any queries or make amendments to the original match, as appropriate.
- Completed matching forms and evaluation reports should be checked for quality to ensure that all boxes have been filled in and reasons given in relation to the job in question for all the factor levels awarded.
- The outcomes (for each factor as well as the job as a whole) should be checked for consistency against:
 1. Other matches completed by the same and other matching panels.
 2. Other local matches within the same occupational group* and job family*.
 3. Other local matches within the same pay band.
 4. National profiles for the same occupational group* and pay band.
 5. Check total weighted score and rank order of jobs for the organisation.

It is recommended that, especially in the case of evaluations, outcomes are compared with **all** relevant national profiles e.g. all those which are in the same job group and pay band. An evaluation may have been required as the post requirements do not conform to the normal tasks and responsibilities for a role. Consistency checking should confirm these differences are justified with the evidence when compared against the national profile.

Further advice on consistency checking.

Consistency checking is largely a matter of taking an overview of a batch of results and applying common-sense, but there are some useful questions to ask, for example:

- Do manager and supervisor jobs match or evaluate higher than the jobs they manage or supervise on those factors where this is to be expected for example responsibility for policy and service development, responsibility for human resources, freedom to act? If not, is there a good reason for this?
- Do specialist jobs match or evaluate higher than the relevant practitioner jobs on those factors where this is to be expected for example, knowledge, analytical and judgemental skills, responsibility for human resources (if teaching others in the specialism is relevant)? If not, is there a good reason for this?
- Do practical manual jobs match or evaluate higher than managerial or other jobs where hands-on activity is limited on those factors where this is to be expected e.g.

physical skills, physical effort, working conditions? If not, is there a good reason for this?

- Consistency checking is made easier when records are stored on a computerised system. Such a system can flag up inconsistencies, missing data or where correlations between certain factors are not as expected, for example, KTE level 7 with FtA level 1.