Ongoing capacity for job evaluation processes

The job evaluation processes are set out in the NHS Job Evaluation Handbook and all organisations should deliver in line with that guidance.

The NHS Staff Council Job Evaluation Group (JEG) acknowledges that, given the number of reconfigurations and staff turnover currently in the NHS, achieving full compliance can be challenging in the short term. The purpose of this guidance note is to outline practical temporary arrangements to support efficient and effective job evaluation practices, which do not breach equal value legislation and support organisations to deliver high-quality services.

In the longer term, it is for NHS organisations working with local staff representatives to ensure that local job evaluation practices are robust and in line with the national agreement.

If organisations follow this guidance they can have confidence that their JE processes are robust and that they are protecting themselves against equal value pay claims.

What the JE Handbook says about panels?

- “Matching should be carried out by a joint matching panel comprising both management and staff representative members. It should be representative of the organisation as a whole. The members must have been trained in the NHS JE Scheme, which includes an understanding of the avoidance of bias. The members must also be committed to partnership working. The number of members per panel is for local agreement, but from three to five is the recommended range, with four being found most satisfactory.” (Chapter 11, section 2.1)

- “It is important for reasons of consistency that a number of core members should, between them, attend as many panel meetings as possible. Records should be kept of panel members and representatives attending each session together with a list of jobs matched. This is for future reference, in case of need to convene a differently constituted review panel to establish an audit trail.” (Chapter 11, section 2.2).

Addressing capacity issues

Among the issues that have been identified are:

- The need to maintain adequate numbers of trained JE practitioners within the organisation. This can help avoid long delays and a backlog of jobs requiring matching/evaluation, reviewing and consistency checking.

- The need for named JE management and staff side leads with responsibility for overseeing job evaluation across the organisation. Time pressures may result in poor practice with regards to outcomes.

- Lack of consistency checking processes.
• The importance of maintaining partnership throughout the process, particularly in new organisations with low union density.
• Succession planning when losing experienced personnel due to reconfiguration or other reasons.

Working in partnership to solve the issues

It is important that all long-term and temporary solutions to existing capacity issues are discussed in partnership. Any solutions should include an action plan aimed at identifying and solving capacity issues.

Action plan for long-term solutions

Examples of issues that can be addressed in a local action plan:

• ensuring sufficient properly trained practitioners
• agreement for sufficient time off for practitioners to sit on panels as required
• support from the organisation and line managers to enable JE practitioners to fully engage in the process and maintain their skills
• mentoring and support from experienced practitioners to refresh supply of new practitioners
• running training courses to train and refresh practitioners’ skills
• temporary action plans should be time-limited with clear measurable goals, which draw on the minimum amount of external support needed to build internal capacity.

TEMPORARY SOLUTIONS TO CAPACITY ISSUES

Solving the problem internally

Initially, organisations should review how they manage JE processes internally and scope whether there is room for improvement, although efficiencies adopted should be consistent with the processes in the Job Evaluation Handbook. This may be by improving administrative and communication procedures; identifying existing trained staff and what may be preventing them sitting on panels; commissioning additional training, e.g. refresher training; ensuring the importance of evaluation is understood by staff side and line managers. Details of the training courses available can be found on the NHS Employers website.
Working with nearby organisations

Consider speaking to local organisations to see if they are able to provide support, even if they do not have the same spread of services or staff groups. It is more important that the practitioners are well-trained and up-to-date in the NHS JE Scheme.

Explore with your neighbours what options are available to you. These may include:

- running panels comprising practitioners from both organisations
- arranging for the neighbouring organisation to run panels on your behalf
- sharing resources for matching and evaluation across both organisations, for example, hosting panels, administration, etc.
- where maintaining sufficient job analysts and job evaluators is difficult due to the low number of evaluations presenting, you may wish to consider working with a neighbouring organisation as a longer-term solution
- learning from your neighbour in how they have integrated JE processes successfully into the trust.

All of these options may entail some cost to your organisation and the following questions will need to be considered carefully before proceeding:

- How do we facilitate collaboration?
- Do we have any informal networks in place already?
- How do we support collaboration in a way that is beneficial to both parties?
- How will we ensure that robust audit trails are made available to the employer responsible for the posts?

Using J EG-nominated national panel members

J EG has a comprehensive database of trained and experienced job matchers and job evaluators. This can be accessed via J EG to supplement local practitioners where there are significant capacity problems, particularly in cases where there are long backlogs. Panel members are spread across the country and it may be possible to access practitioners within your region.

This is facilitated by the J EG secretariat (Eleanor.ransom@nhsemployers.org) and the organisations will be expected to provide a venue, resources and pay practitioners expenses. These practitioners will not be expected to provide consultancy services for third party organisations.
Use of third-party consultants

Using third-party consultants is unlikely, in the longer term, to support local organisations to develop sound and comprehensive internal processes. This is because it does not build or develop internal JE resources and knowledge within the organisation. Consequently, JEG advises that using third-party consultants should as a rule be a short-term solution, which is used when other options have been exhausted.

JEG recommends that use of third-party consultants be subject to the following criteria:

- Any temporary agreement with a third party should have clearly defined time-limits and be measurable against set criteria.
- Partnership working underpins the NHS JE scheme, therefore it is important that any external panels can demonstrate that they work in partnership.
- The organisation must be satisfied that external panel members have been properly trained in the NHS JE scheme and understand the principles, which underpin it.
- All information relating to the panels and the decisions they make should be audited and handed over to management and staff side JE leads of the organisation. Ownership of the information should rest with the organisation and not the third-party consultancy.
- Arrangements should be in place to ensure that there are channels for dialogue to allow panel findings and rationales to be interrogated, understood and differences reconciled.
- Consistency checking is carried out within the organisation and where possible not by a third party.
- The organisation needs to give some thought to how requests for review will be managed.

Job Evaluation Group