

**Matching procedure
(chapter eleven)**

1. Aims

1.1 The aims of the matching procedure are:

- To secure outcomes which accurately reflect the demands of the job and ensure equality of pay.
- To match as many jobs as possible to national evaluated profiles in the most efficient manner possible avoiding the need for many local evaluations.
- For the matching process to be carried out by a partnership panel of trained practitioners.

2. Matching panel(s)

2.1 Matching should be carried out by a panel comprising both management and staff representative members. It should be representative of the organisation as a whole. Panel members must have been trained in the NHS JE Scheme, and this training must include an understanding of the avoidance of bias. These trained practitioners must also be committed to partnership working. The make-up of matching panels is a matter for local agreement but panels must operate in partnership. It is good practice for panels to have equal numbers of staff side and management practitioners with four panel members (two of each) being most effective. No one panel member has deciding vote and panels must reach consensus decisions

The panel can operate with three practitioners should circumstances occur that a practitioner cannot attend and the rest of the panel agree they are happy to continue. The panel can operate with five practitioners. This option is to support the development and confidence of new practitioners to the JE team.

2.2 Records should be kept of matching panel practitioners 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

2.3 When the panel meets two people representing management and staff in the area of work under consideration should ideally be available to answer any queries or clarify any information about the post being matched. However, this may not always be practical and questions may need to be asked in writing and written answers considered by the panel at a later date. These job advisers/ representatives should be briefed about the matching process. It is essential that any additional information provided is recorded and forms part of the audit trail. Panels may wish to recommend that job descriptions are amended to reflect it.

3. Documentation

3.1 The matching process is based primarily on agreed and up-to-date job descriptions for the jobs to be considered. The post-holder/job advisers/representatives may add local information where appropriate, this must be agreed between the post-holder and their manager, and signed and dated by both parties. It is important to ensure that all relevant documentation is before the matching panel. This includes the job descriptions, person specifications and organisation charts for jobs to be matched and, where relevant, other reference documents and any short-form questionnaires used to collect supplementary information, for example in relation to the effort and environment factors.

4. Step-by-step procedure

4.2 For each job, the matching panel should:

- **Read the job description**, person specification and any other job information in order to select appropriate national profiles.
- **Identify possible profile matches** using the (computerised or paper-based) profile index and profile titles (there are unlikely to be more than three possible matches). Appropriate profiles will usually be from the same occupational grouping, for example nursing, speech and language therapy or finance.

- **Compare the profile job statements** with the job description, person specification and any other available information for the job to be matched. The available information about the job duties must be consistent with the profile job statement and, in the majority of cases will be from the same occupational grouping*. If this is not the case, the match may need to be aborted, another profile sought or, if no suitable profile is available, the job sent for local evaluation. If the job duties do broadly match, complete the job statement box on the (computerised or paper-based) matching form.
- **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 job advisers/representatives. Refer to the profiles for the types of information required.
- **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 (for example 'supervises trainees' is equivalent to 'supervises students').
- **It is important to consider all factors and not just prioritise a few.** All job information is relevant and, must be taken into account to ensure robust outcomes that are justifiable and guard against panels shoe-horning jobs into profiles which may lead to an inappropriate band outcome.

NB – with regard to factor 2 – Knowledge, Training and Experience

It is not advisable to match or evaluate this factor using a personal specification and qualification levels alone. Knowledge must be assessed in the context of demands and responsibilities of the whole job. Panels should always check that, where a qualification is specified in the person specification, that this is actually required for the job.

It is crucial that panels are satisfied they have taken into account all information set out in the job description, person specification and any additional information, for example, organisational chart. The knowledge required for the job may be partly made up from on-the-job learning, short

courses and significant experience which leads to a “step up”, as well as the level of qualification expected.

Record the panel findings and decisions in the appropriate forms – either paper based or computerised. These records should indicate where factors match or vary or if it was not possible to match the factor on the profile.

- **M=Match** – where the agreed factor level is found to be the same as the profile factor level or is within the profile factor range
- **V=Variation** – where the agreed factor level is found to be either one level higher or lower than the profile factor level or range.
- **NM= No match** - where the agreed factor level is found to be more than one level higher or lower than the profile factor level or range.

5. Determine the matching outcome

5.1 Possible outcomes are:

- If all factor levels are within the range specified on the profile, this is a (perfect) profile match.
- If most factor levels match, but there are a small number of variations, there may still be a band match, if all the following conditions apply:
 - the variations are of not more than one level above or below the profile level or range, *and*
 - 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*
 - the variations do not apply to more than five factors. Multiple variations are indicative of a different profile or the need for a local evaluation, *and*
 - the score variations do not take the job over a grade boundary.

If any factor is recorded as a no match this must be recorded and the process repeated with another profile. If there is no other possible profile,

refer the job for local evaluation (see chapter 12).

5.2 When a profile or band match has been achieved, complete the score column and remaining sections of the matching form. All documentation should be submitted for consistency review (see chapter 14).

6. Consistency checking and confirming matching outcomes

6.1 All job evaluation outcomes must be subject to consistency checking (see Chapter 14). Consistency checking should only be undertaken by experienced JE practitioners who have received relevant training. It must be conducted in partnership with at least one two people, one from management side, one from staff side.

6.2 Only when consistency checking is complete and any apparent inconsistencies resolved should the matching form be issued to jobholders covered by the match, together with the relevant national profiles and a personal letter explaining the proposed pay banding and what to do in case of disagreement (see chapter 13 for the review procedure).

Note:

*Examples of job families are: nursing and midwifery, allied health professions (AHP), administrative and clerical jobs, support services.

Examples of occupational groups within these job families are: nursing, speech and language therapists, finance jobs, portering jobs.