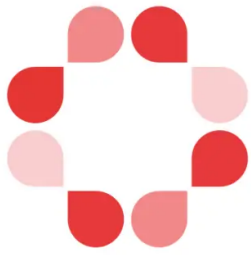


**Job evaluation guidance:
practical guidance for
matching and evaluation
panels**



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NHS Staff Council

**Job Evaluation
Group**

Introduction

This guidance is intended to provide panels with additional information how to apply this factor in practice.

Knowledge, training and experience (KTE) is the most heavily weighted factor in the NHS Job Evaluation (JE) Scheme. The level of KTE awarded often makes a difference between one pay band and the next. Therefore, it is essential that jobs are correctly evaluated or matched under this factor heading. Getting the level of KTE right helps ensure fairness and consistency and reduces equal pay risk.

The Job Evaluation Group (JEG) has produced a step by step approach to assessing KTE and recommend panels follow this approach when matching and evaluating jobs.

When assessing KTE it is crucial that panels take into account all information set out in the job description, person specification and any additional information provided.

Panels must not complete the assessment of KTE if sufficient information has not been provided and must not make assumptions about the requirements of the role. In these situations, panels should seek additional information by asking questions or seeking clarification from the job advisors. This includes ensuring any qualifications listed are required for the level of responsibilities described.

Sources of information to help assess KTE requirements

Job descriptions: Usually the primary source of KTE evidence. A good job description will explain the different type of knowledge, training and experience required for the role. They will detail any qualifications required for the role and the types of experience needed. Some job descriptions may not be clear on the level of knowledge, training and experience required, but it is the panel's duty to find out by asking further questions. See chapter 10 of the Job Evaluation Handbook for further details.

Person specifications: Advice from the NHS Staff Council makes it clear that person specifications are not always enough to assess the level of knowledge required for a job. Where these are in use, panels should ensure they have sufficient information available to assess KTE.

Please note: competency based frameworks, professional career frameworks, professional bodies' career pathways or descriptors should not be used for job matching.

It is important that only the KTE requirements for the role are assessed and panels do not rely on educational qualifications, performance or achievement that are related to an individual post holder when considering this factor.

In some cases, person specifications overstate the level of formal qualifications required when compared to the actual demands of the job. Panellists must challenge this with the recruiting line managers or job advisors to assure themselves that the requirement is warranted for the job and not included for recruitment/shortlisting purposes or to influence the banding outcome.

Further information:

- Read the factor section of the Job Evaluation Handbook.

Assessing the level of KTE

Care must be taken to recognise all knowledge, skills and experience required, irrespective of whether a formal qualification is required. This will need to include on the job learning, short courses and informal learning gained through experience from colleagues as well as formal education and other skills.

Advice on relying on qualifications to assess KTE

Panels must not rely on qualifications alone when assessing KTE.

Educational qualifications can reflect the KTE requirements of role. However, these can often under or over-state when included in job descriptions and person specifications.

The main focus for a panel is to consider what KTE the job requires rather than what qualifications the job holder has achieved. Particular care should be taken when evaluating changed jobs and reviews.

When assessing job information panels should apply the guidance in chapter 10 of the handbook - job descriptions and other job information, para 10.2.5 states:

- JE practitioners are trained to challenge use of factor language in job descriptions e.g. “highly complex” or “intense concentration”.
- Likewise they should not accept at face value person specifications that are out of line with the duties of the job, e.g. requiring a masters level qualification if there is little evidence of use of this level of knowledge.

How to consider what experience is equivalent to a qualification

This can be an extremely difficult task to undertake and panels must ensure they scrutinise all job information and ask questions of the job advisors where necessary. The purpose of this is to fully understand what KTE needs to be applied to undertake the job.

For example, a job purpose includes the following:

- responsibility for developing and implementing policies for a service (30 per cent)
- devising and delivering training to support policy implementation and changing working practices across the service area (30 per cent)

This is further described in the main duties section.

The KTE section doesn't mention having knowledge or experience of developing and implementing policy, or devising and delivering training. However, it does include the requirement to be a registered allied health professional (AHP) with a relevant degree.

In this example, the panel should consider what the KTE requirements for this post might be.

This could include knowledge of a particular topic area, how to write policy documents, experience of designing training content and delivering training to groups both face to face and using Zoom or MS Teams. The panel can't make this assumption, but could agree to check with the job advisors to establish whether there are any additional requirements.

Using only the qualification information, a panel may award KTE level 5 based on the requirement to hold a degree and be a registered clinician. However, if a panel have awarded policy and service development (Factor 7) at level 4 and human resources (Factor 9) at level 3 they can assess whether this fits well with KTE at level 5 or may reflect KTE at level 6, for instance, specialist knowledge across the range of work procedures and practices, underpinned by theoretical knowledge or relevant practical experience.

The panel should also consider the national profile statement to ensure this is a 'good fit' with the role as it is described and they understand it.

Qualifications frameworks and descriptors

Panels may check qualification frameworks and descriptors to help understand equivalence or to become better informed on job information provided to them. Panels should remember that the job requirements must be taken into consideration and not rely on stated qualifications.

It can also be useful to check definitions of what the qualifications means, the time taken to obtain them, the skills obtained or achieved and then, how these are applied in the role.

Links to other guidance:

- [Guidance for England](#)
- [Guidance for Scotland](#)
- [Guidance for Northern Ireland](#)
- [Guidance for Wales](#)

To note: Please be aware that skills levels used by education and qualification organisations, for example Skills for Health, are not equivalent to NHS JE Scheme factor levels. For example a Skills for Health level 2 does not equate to a band 2 job or even that the KTE is level 2.

Knowledge gained by experience

This can be difficult to quantify or certificate unlike that gained through formalised training or educational courses. For example, knowledge required to effectively communicate in demanding situations is often overlooked as a knowledge requirement as typically knowing what to say is likely to be developed through experience.

Similarly being able to deviate from standard operating procedures or policies may only come from knowledge gained by experience. This is why it is important to consider what is done rather than simply relying on qualifications listed in the job description.

Number of years' service or experience should not be used as a rationale for justifying a certain factor level. It is possible that this contravenes sex and age discrimination legislation.

KTE level and links to skills and responsibility levels

Whilst there are some limited exceptions, it is expected that higher KTE levels will be awarded to roles that have higher levels in other skill or responsibility factors. This reflects how knowledge, training and experience are used and applied when carrying out the role as detailed in the job description.

Step by step approach to assessing KTE requirements

1. All panel members should read the full job description before attempting to match the post. The job description should be read from the job purpose, then each section in order. Panel members should avoid checking the qualification information or person specification as a first step. This will help panel members to get a fuller understanding of the role and avoid short cuts being taken.
2. When all panel members have read the job description, the panel should confirm there is sufficient information available to proceed with the matching exercise.
3. As there is such a wide range of jobs in the NHS panels should consider the different types of knowledge required for the role being graded. This includes administrative, clinical, therapeutic, social care, scientific, technical, equipment, systems and managerial knowledge, depending on the role.

4. If there are any questions on the knowledge, training and experience requirements, these should be noted by the panel. These can be checked again after considering all 16 factors. Going through all 16 factors will assist the panel to assess the types of knowledge required for the role and how this will be applied. The panel can then decide whether additional information or clarification needs to be obtained to complete the matching exercise.

5. Generally, panels should not accept qualification levels at face value when these are included in a job description or person specification without specifying a particular topic/subject area that is relevant for the role. For example, where content includes phrases such as 'educated to masters level or equivalent' panels should check what types of knowledge are actually required and how these would be obtained.

6. Where phrases like 'working towards' a qualification are used in job descriptions, panels should check what the actual requirements of the role are and how knowledge can be gained through alternatives to an academic qualification route. This could include on the job learning, short courses, experience or a combination of these.

When 'desirable' is used in the KTE section of a job description, the panel should check whether training will be provided once in post and whether the knowledge is actually required for the role. Often, KTE requirements listed as desirable are used specifically for recruitment and shortlisting purposes.

- a) The panel should check the job purpose and main duties and responsibilities section of the job description as there may be evidence of how the knowledge would be applied in the role.
- b) If clarification is required the job advisors/representatives should be contacted.
- c) Panels must make notes and record the additional information provided.

7. The panel should check the KTE level again when all 16 factors have been assessed. This allows for a 'sense-check' to be completed. Panels should check that the KTE level is set at an appropriate level, reflecting the skills required for the role, decision making, problem solving and

responsibilities. It can be helpful in some cases to check variations in the skills and responsibilities factors when profile matching and consider how these may impact on the KTE factor level.

KTE escalator

This document provides further information on factor two – knowledge, training and experience and shows in a visual format how the levels of the factor escalate, how the levels of knowledge are attained and the training or experience that is required.

JEG have also provided further guidance on understanding how to assess the knowledge skills that can be assumed by a level of qualification and hope that this will be helpful when considering “equivalence”.

Download the [KTE escalator](#).