

## Agenda for Change Job Matching and Re-Banding Policy

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<b>CONSULTATION SCHEDULE</b>	
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1	MLCSU	November 2021	CCG Governing Body	New Policy
2	MLCSU	August 2025		Policy review and rebrand to ICB

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## **1. Introduction**

- 1.1.** This policy gives clarity on the procedure for rebanding posts that fall within the scope of Agenda for Change (excluding medical, dental and those on local terms and conditions and on very senior manager / Governing Body contracts), either on a substantive or temporary basis.
- 1.2.** By far the majority of roles include some elements of higher and lower banded work so any small variation in this, such as covering for colleagues in roles of a higher or lower band, is not normally related to a permanent review of banding. In some occasions, staff may be given opportunities to 'act up' into vacancies at a higher level; in these cases, there should be a selection process related to the appointments process.
- 1.3.** It is important to note that applications for rebanding should be based on the requirements of the post, not on the actual skills and experience of the post holder.
- 1.4.** It should also be noted that undertaking a greater volume of work at the same band does not normally constitute grounds for rebanding.
- 1.5.** If an employee is to be given additional responsibilities the line manager must ensure that if there is more than one post holder who could assume responsibility for those duties then a restricted competitive process is followed.
- 1.6.** It is important to consider that rebanding requests are an area which can often create anxiety for staff. It is important that good people management skills are employed across the ICB to avoid disappointment for staff who feel their contribution is not being fairly rewarded and as such the following points should be routinely taken into consideration by line managers.
  - Ensure all staff have a current, accurate job description, which is reviewed in discussion with them.
  - Ensure that staff are not routinely expected to perform duties beyond the remit of their job description and level of remuneration.
  - If it becomes necessary to extend an individual's duties, and responsibilities this should not be done unless managers can identify funding to support it. The ICB has an established level of funding against an established mix of staff. Any enhancement of the overall establishment needs to be funded by appropriate service development funding or, internal restructuring that identifies the necessary resources.

## **2. Policy Statement**

- 2.1.** It is recognised that posts often change and evolve over time, or new posts are developed as a requirement of service or organisational change. This policy has been prepared as part of the Agenda for Change (AfC) partnership working model to provide a mechanism whereby posts can be subject to the AfC matching/evaluation procedure to recognise essential role changes.
- 2.2.** Only significant changes within a job role are likely to affect matching or evaluation. These changes must be based on increased responsibility and not normally increased volume of work or length of service. When a job is identified as having changed significantly a decision needs to be made by the panel as to whether it is likely to match a national profile.

- 2.3. It should be recognised that a corporate perspective must be maintained at all times in relation to requests for matching. The initial response to a post holder requesting their post to be matched is for their line manager to clarify their role as per the existing job description and not to agree to a rebanding request until all the facts have been considered. Advice can be obtained from Human Resources.
- 2.4. Only essential service or organisational change should be considered as grounds to allow a job role to change.
- 2.5. This policy applies to both temporary and permanent changes to posts.
- 2.6. It is also recognised that on occasion a post may change less significantly, perhaps where additional responsibilities are allocated, however the change is not significant enough to warrant a change to pay band. (For further guidance see Appendix 1).
- 2.7. A revised Job description cannot be processed unless it is fully supported by the jobholder, line Manager and relevant Director. It is imperative that the revised job description presented is reflective of the individual post to be matched.
- 2.8. Best practice dictates that when specialist professional roles are being considered the professional lead should be consulted regarding the content of the job description and person specification (i.e. Nursing, Finance, etc.)
- 2.9. As any potential cost effect of the job matching process will be met from the relevant ICB budget, consideration of the financial impact in line with current agreed staffing establishments will need to form a major part of the consideration in agreeing a role can develop outside its existing pay band.
- 2.10. Services/departments may not progress a matching request that would impact upon similar jobs in other services across the ICB without undertaking full consultation and benchmarking with the other effected service directors. This process must involve oversight and consultation with Human Resources and be evidenced in the supporting documentation.

### **3. Scope**

- 3.1. This policy will apply to all employees of the ICB covered by the Agenda for Change Terms and Conditions.

### **4. Responsibilities**

#### **4.1. Responsibilities of the ICB**

- 4.1.1. The responsibility for the monitoring and provision of this policy initially rests with the Governing Body of the ICB

#### **4.2. Responsibilities of Human Resources**

- 4.2.1. Human Resources are responsible for providing advice, guidance and support to line managers when considering re-banding requests and for the eventual submission of requests to the panel process.

#### **4.3. Responsibilities of Managers**

- 4.3.1. Managers are responsible for ensuring all requests are dealt with in a fair, equitable and consistent manner and in line with the policy.

- 4.3.2** Managers are also responsible for making fair and informed decisions in line with policy, legislative and regulative requirements.
- 4.3.3 Managers are responsible for ensuring that job descriptions are maintained and updated as requested so that they accurately reflect the current reality of the duties. Job descriptions are normally reviewed at the employee's annual appraisal.
- 4.3.4** Manager Guidance : How to write a Job Description (appendix 1) and Managers Guidance : How to update a Job Description (appendix 2) has been developed to assist managers in creating and updating job descriptions.

## **5. New Posts – Prior to Recruitment**

- 5.1.** The recruiting manager will be responsible for drafting a comprehensive job description and person specification which accurately reflects the duties required of the post and the skills and abilities required of the person in the post. Where necessary, managers should seek advice from Human Resources.
- 5.2.** Once complete, the job description and person specification should be submitted to Human Resources. A Job Matching Review will need to be carried out. See appendix 5 for the Job Matching Request Form.
- 5.3.** Recruitment will then take place using the pay band that has been determined. Applicants will be made aware that the post will be subject to a further review. Once the post holder has been in the role for at least 6 months and no later than 12 months, the job can be fully evaluated.

## **6. New posts – reviews**

- 6.1.** The job description and person specification should be reviewed by the line manager with the job holder, in line with guidance, to determine whether it still truly reflects the role being undertaken or whether any changes need to be made. Once agreed, the job description and person specification should be signed by the job holder and line manager and then submitted to Human Resources for a review. Where there is more than one job holder, then arrangements should be made by the jobholders for a suitable member of staff to be responsible for conveying the opinions of the rest of the job holders and for agreeing the job description and person specification.
- 6.2.** If agreement cannot be reached regarding the contents of the job description then contact with Human Resources should be made to try to resolve the issues.

## **7. Re-banding on a Substantive Basis**

- 7.1.** The following process must be applied when assessing a post in respect of a rebanding on a substantive basis:
- 7.2.** Applicants will be required to complete the “Job Matching Request Form” (see Appendix 5) providing an explanation/supporting information on the factors within their current post that have changed since the previous AfC banding outcome to assist the panel.
- 7.3.** The agreed completed request form should be returned to Human Resources together with:
- Current job description/person specification
  - Proposed job description/person specification clearly highlighting the agreed revisions

- Current and proposed Organisational Chart of the service to include existing posts and pay bands

- 7.4** On receipt of the documentation Human Resources will undertake a quality check to ensure all documentation is available to support the request. The manager will also receive an acknowledgment email and confirmation of when the request will be sent to a Job Matching Panel.
- 7.5** All documentation will be submitted to a Job Matching Panel (made up of at least three JME (Job Matching Evaluation) Practitioners that will include representation from both management side and staff side). The Panel will consider the request in accordance with the nationally agreed procedures and any locally adapted agreements. The panel will attempt to “match” the post to a national profile or determine if a Job Evaluation is required. The manager will be asked to be available (if possible) should the panel require any further clarification. The postholder(s) is required to attend the Job Matching Panel.
- 7.6** If a block application for rebanding is to be made from a group of staff on the same band, with the same job title and job description, then only one job description/person specification should be submitted on behalf of the whole group.
- 7.7** The outcome of the job matching panel will be notified to Human Resources and all relevant parties.
- 7.8** Following the job matching panel the manager will be informed of the outcome in writing.
- 7.9** If the Job Matching Panel is to undertake a Job Matching Review and the applicant’s application is unsuccessful they have no further recourse – see Section 7 – Job Matching Review.
- 7.10** Re-banding applications will be backdated as appropriate.

## **8 Re-banding on a Temporary Basis**

- 8.1** Agenda for Change Terms and Conditions do not allow acting up within a banding. An employee taking on temporary additional responsibilities would need to have the temporary role assessed to determine whether it was necessary to re-band on a temporary basis to a higher band. To ensure a consistent approach, when employees are given additional responsibilities on a temporary basis, the following principles will apply: -
- 8.2** Any temporary arrangement must last at least one month and up to a maximum of 6 months, unless there are exceptional circumstances.

### **8.2.1 Taking on additional responsibilities within the same banding:**

If an employee agrees to undertake someone else’s job, they will remain within the same banding. There will be no incremental credit, however, this will be seen as an opportunity for development. Employees taking on another role should be assessed against that post outline to identify any skills and knowledge areas for development.

### **8.2.2 Taking on additional responsibilities within a higher banding:**

If an employee is required to undertake someone else’s job, in full, within a higher band they will be required to work to that job description and the grade of the post i.e. given the same higher banding. They will be put on a pay point that is the nearest above their existing salary.

This will be a temporary rebanding (not acting up) in accordance with AfC Terms & Conditions of Service.

## **9 Evaluation process**

- 9.1** In the event that 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 evaluation.
- 9.2** 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 2 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)
- 9.3** 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.

## **10 Job Matching Review Procedure**

- 10.1** Should a manager or a post holder be dissatisfied with a job matching outcome they have the right to request a review. They must notify in writing to the next appropriate manager in line, stating the reasons for review and with the completed Job Matching Review form (see Appendix 6) within 30 days of the date of the outcome letter.
- 10.2** Human Resources will arrange for an Job Matching Review panel to be convened at the earliest opportunity which will comprise a new matching panel and they will consider the original matching outcomes based on the information provided on the completed Job Matching Review form completed by the post holder.
- 10.3** The decision of this panel will be final.
- 10.4** A member of staff has the right to invoke the Grievance Procedure if they are dissatisfied with the application of this procedure but not to request further panel considerations.

## **11 Equal Opportunities and Diversity**

- 11.1** The Agenda for Change Rebanding Policy should be read in conjunction with the ICB's Diversity in Employment Policy.
- 11.2** In applying this policy, the Organisation will have due regard for the need to eliminate unlawful discrimination, promote equality of opportunity, and provide for good relations between people of diverse groups, in particular on the grounds of the following characteristics protected by the Equality Act (2010); age, disability, gender, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, and sexual orientation, in addition to offending background, trade union membership, or any other personal characteristic.
- 11.3** Promoting diversity embodies the principles of fair treatment for all and will, as a result, improve the retention of staff. The ICB values the diversity of its workforce and aims to ensure that all staff understand this commitment and adhere to the required standards.

## **12 Monitoring**

- 12.1** This policy and procedure will be reviewed periodically by Human Resources in conjunction with the ICB and Trade Union representatives. Where review is necessary due to legislative change, this will happen immediately.

- Appendix 1   Managers Guidance : How to write a Job Description**
- Appendix 2   Managers Guidance : How to update a Job Description**
- Appendix 3   Glossary & FAQs (under development)**
- Appendix 4   Job Matching Guide : the process**
- Appendix 5   Job Matching Request Form**
- Appendix 6   Job Matching Review Form**