

Human Resources Management Guidance

**Grading for new posts &
regrade for current posts**

Grading for a New Post

Process

When a need for a new post has been identified a Job Description (JD), which must contain an organisational chart and Person Specification (PS) must be developed. HR must be notified at this stage what the anticipated banding outcome is, this will help HR understand how the post fits in with the existing structure and understand any potential impact on other posts within the function and consistency with similar posts across the whole Organisation e.g. training posts. HR will assist with the identification of any relevant National Profiles.

Once the JD and PS have been agreed by all relevant parties, any National Profiles have been identified and everyone is confident that the documents reflect the new role the JD and PS must be submitted to the Job Evaluation (JE) Administrator. The sign off form which has been duly signed by the relevant HR Business Partner or Associate Business Partner (Appendix 1) must also be sent to the JE Administrator.

The JD & PS will then be used to carry out a desktop exercise. A desktop exercise is standard job evaluation practice for new jobs. The purpose of a desktop exercise is to establish a provisional pay band for recruitment purposes.

The JE Administrator will convene a panel to carry out the desktop exercise, using the agreed documentation. Panel members will be fully trained in Job Evaluation and will consist of at least one management and one staff side representative.

When a panel conducts the desktop, if further information/clarification is needed, the panel will contact the manager who compiled the documentation to obtain this.

If the result from the panel is the anticipated AfC pay band, the outcome will be released by the JE Administrator.

If the result from the panel is either a higher or lower pay band than was anticipated feedback will be given to the Manager, copied to HR, to establish whether the content of the JD and PS can be clarified/expanded to try to resolve the difference between the expectation and the outcome. If subsequent changes are made the post will be put back to a further panel. Once the required outcome has been achieved the JE Administrator will confirm the outcome to the manager.

Note: Prior to the release of any outcomes all posts submitted for desktop will be subject to NHSBT consistency checking procedure.

The outcome will then form the provisional pay band for the post. Staff being appointed to the post will need to be advised of the provisional nature of the pay band and made aware that the banding may increase or decrease.

For all desktop exercises once the new post has been in operation for a reasonable period of time i.e. nine to twelve months, the post will be re-examined to ensure that the banding outcome achieved through the desktop

process is accurate. This will normally be done by using the updated JD/PS and where possible the post will be matched or if a match cannot be achieved the post will be evaluated using the JD and PS (Appendix 2). However, if the manager and/or post holder have concerns about the initial desktop banding outcome they have the option to complete and submit a Job Analysis Questionnaire (JAQ). This process will be instigated by the JE Administrator via HR.

When the post has been revisited if it is found that the AfC pay band is lower than the band achieved through the desktop exercise every effort will be made between all parties to develop the job so that the original pay band is maintained. If on the rare occasion the desktop pay band cannot be achieved then the following will apply:

- the post will be correctly banded at the lower AfC band; and
- the individual will be placed on the appropriate salary on the correct pay band and will receive pay protection.

If, upon revisiting the post the AfC band is higher than the provisional pay band determined by the desktop then the increased band will take effect as follows:

- if there have been no enhancements to the job and it is apparent that the job should have been the higher pay band from the outset then this will be discussed between HR, the member/s of staff and their manager and will be back-dated to the date that the post holder/s took up the post.
- if additional duties were added to the post and it is this that has increased the band then the effective date for this increase will be from the date the additional duties commenced.

Request for Re-grade of Current Post

Background

Where changes to a role have been identified and these are considered to be significant, either in the amount of change, or the nature of the change e.g. increased levels of responsibility over what would be seen as reasonable for the role, it will be necessary to assess the possible impact of the changes on the grade for the post via a matching or evaluation exercise.

Where post holders are part of a “cluster group/generic role” it is important to be clear that if the role changes this will affect all post holders. If an individual member of a “cluster/generic” group of staff feels their role has substantially changed (but this does not affect any other post holders in the group), these changes need to be agreed with the line manager and they would then be treated as an individual post holder and only their agreement to any subsequent Job Description (JD)/Person Specification (PS) and/or Job Analysis Questionnaire (JAQ) would be required. If, however, the significant changes affected the whole group of post holders, the majority of post holders (i.e. 50% + 1) would need to agree any subsequent JD/PS and/or JAQ.

Process

Management and the post holder(s) will identify the changed/developed job demands of the existing post. The manager should contact JE Administrator to obtain the latest JD/PS and/or JAQ and to establish exactly what documentation needs updating. HR must be advised as to what the anticipated outcome is, this will help HR understand how the changed posts fit in with the existing organisation structure and understand any potential impact on other posts within the function.

The JD, including an organisational chart, PS and/or JAQ should be updated (using tracked changes). Once all interested parties are content that the documents reflect the amended role the revised they should be submitted to the Job Evaluation (JE) Administrator. The sign off form which has been duly signed by the relevant HR Business Partner or Associate Business Partner (Appendix 1) must be also be sent to the JE Administrator.

The JE Administrator will convene a panel to carry out the matching or evaluation, using the agreed documentation. Panel members will be fully trained in Job Evaluation/Matching and will consist of two management side and two staff side.

When the matching or evaluation is taking place, if further information or clarification is needed, the panel will contact the manager who compiled the documentation to obtain this.

Following the Evaluation/Match all posts will be subject to the NHSBT consistency checking procedure prior to the release of the pay band.

The JE Administrator will advise the manager of the results and this will be confirmed by issuing a Grading Approval Form along with the Computer Aided Job Evaluation System (CAJE) report. It will then be the manager's responsibility to advise the post holder/s and complete the relevant paperwork

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to implement the changes on the ESR system. The post will not require a further JE assessment.

Changes to posts that do not Warrant a full Re-grade

Process

Posts may have small changes to the duties in terms of updating working practices or slight variations which would fall within the remit of the role and grade and therefore will not be required to go through the full process.

It is important, however, that any changes agreed between post holder(s) and their line manager(s) are submitted (showing tracked changes) to the JE Administrator.

If you intend to make changes to a generic JD/PS please contact the JE Administrator for specific guidance.

The JE Administrator will issue a Grading Approval Form.

The post will not require a further JE assessment.

APPLICATION FOR EVALUATION OF NEW POST / REGRADE OF EXISTING POST

Please complete this form for all requests for an AfC Pay band for New/Existing and Temporary posts.

Job Description Ref. No (if Known)	
Post Title	
Amended Post Title (if applicable)	
Current Pay band (if Existing Post)	
Anticipated Pay band	
Suggested Relevant National Profile/s	
Reason for Request	
<p>To be completed by Employee/ Representative Post holder (RPH) (This section does not need to be completed for a request for a new post)</p> <p>We confirm that the above JD & PS are an accurate and up to date account of the duties, responsibilities, skills and qualifications required to undertake the job and we would now like them to be put forward for a re-grade.</p>	
Post Holder/s Signature/s	Date
Location of Post Holder/s	Employee No:
Line Manager	Signature
Line Manager Location:	Date
To be completed by Business or Associate Business Partner	
Name (Please Print)	Date:
Signature:	
This form should be sent to the JE Administrator, Bridle Path, Leeds	

Request for Confirmation of Desktop Provisional Grading

Post Title		
Post Reference No:		
Directorate/Department		
Name of Post Holder/Representative Post Holder (if applicable)		
Line Manager (of Post Holder/RPH)		
Centre (Full Address)		
Contact Tel No of Post Holder/RPH		
Name of line manager representing the group (if applicable) & Contact Tel No		
Job Description Emailed Please Tick Box	Person Specification Emailed Please Tick Box	Final Version of JAQ Emailed Please Tick Box
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

I, (Print Name) confirm that the Job Description/Person specification and or Job Analysis Questionnaire has been discussed with the Post Holder/Representative Post Holder/s and it is an accurate and up-to-date account of the post. I will ensure that copies of the JD/PS and/or JAQ are emailed to the - JE Administrator.

Line Manager/Manager Representative:-
(Signature)

Date:-

Post Holder/Representative Post Holder:-
(Signature)

Date:-

(We agree that the JD & PS have been reviewed following the provisional payband achieved by the “desktop” grading and now request that the JD, PS and JAQ (if required) are submitted for a final grading.

<p>PLEASE RETURN THE SIGNED SUBMISSION FORM TO: JAN HARPER – JE ADMINISTRATOR, BRIDLE PATH LEEDS, LS15 7TW</p> <p>NOTE – Job Description/Person Specification and JAQs <i>must</i> be sent electronically If completing a JAQ please submit form once the final version of JAQ has been agreed</p>
