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**Appendix 11**

# AGENDA FOR CHANGE

# CONSISTENCY CHECKING PROTOCOL

**Purpose**

This protocol has been agreed by the NHS Fife Partnership and HR Policy Groups for the purpose of consistency checking within the Agenda for Change Matching and Evaluation processes, in line with section 14 of the NHS Agenda for Change Job Evaluation Handbook, 7th edition, September 2018 (amended April 2020).

**Background**

The matching procedure was designed to maximise consistency of application of the Agenda for Change pay system across NHS organisations. However, even with the best possible training and most dedicated matching panels, some inconsistencies may occur, through, for example, tiredness or time pressures.

**Consistency checking involves ensuring that all matching is accurate and consistent across the jobs matched and with the national profiles.**

Failure to carry out rigorous consistency checking may appear to save time in the short term, however, is likely to increase the number of requests for appeals in the medium term and grievances and possible equal pay claims in the longer term.

Consistency checking is facilitated by having factor and overall outcomes in spreadsheet form, and using data on TURAS, but consistency panels will also need access to the original job descriptions, and questions / answer responses, in case of queries and any JEMG reports, if appropriate.

**Monitoring**

Consistency checking should be distinguished from monitoring, which is a separate, although overlapping, higher level process of reviewing the pattern of outcomes within NHS organisations. The purpose of monitoring is wider than that of consistency checking and includes, for example, the implications of the outcomes for costs.

Monitoring of posts within NHS Fife will be undertaken by the JE leads from both management and staff side who will in partnership agree which posts require consistency checking.

**Consistency Checking Procedure**

Consistency checking will be carried out in partnership within NHS Fife, this protocol deals with the actual process of consistency checking and supplements, but does not replace, the advice within the Job Evaluation Handbook.

A full consistency check should be undertaken as a minimum by a designated partnership pair, e.g. comprised of management and staff side job evaluation leads who are experienced job evaluation practitioners and trained in consistency checking who were not on the evaluation panel. They will carry out a consistency check of the evaluation panel’s outcome considering other banding outcomes within NHS Fife, to ensure the outcome is consistent with similar roles within NHS Fife. The consistency panel will have access to all the information that was available to the evaluation panel and the evaluation panel’s work via the TURAS job evaluation system on which they will record their further work.

If the consistency panel finds that the evaluation outcome would not be consistent, they should arrange to discuss this with the original evaluation panel to reach agreement of all evaluators on the outcome.

Completed matching forms and evaluation reports should be checked for quality to ensure that all boxes have been filled in and reasons given in relation to the job in question for all the factor levels awarded.

The outcomes (for each factor as well as the job as a whole) should be checked for consistency against:

* Other matches completed by the same and other matching panels.
* Other local matches within the same occupational group\* and job family\*.
* Other local matches within the same pay band.
* National profiles for the same occupational group\* and pay band.
* Check total weighted score and rank order of jobs for the organisation.

Any apparent inconsistencies in matching should be referred back to the matching panel with any queries and/or comments. The consistency checkers should NOT substitute their own with any queries and/or comments. The consistency checkers should NOT substitute their own decision. The original panel should then review the match or evaluation in question and answer any queries or make amendments to the original match, as appropriate.

It is recommended that, especially in the case of evaluations, outcomes are compared with **all** relevant national profiles e.g. all those which are in the same job group and pay band. An evaluation may have been required as the post requirements do not conform to the normal tasks and responsibilities for a role. Consistency checking should confirm these differences are justified with the evidence when compared against the national profile.

Consistency panels will operate as required on an ad hoc basis.

Consistency panel members should not routinely check posts which they have matched. Consistency panel members like matching panels, may require to speak with managers / relevant contacts for clarification via MS Teams or email requests for more information to reach a decision.

Outcomes of consistency checks will be recorded on TURAS.

Any issues identified during consistency checking will be fed back as appropriate to the respective panels and concerns as appropriate raised with the STAC Job Evaluation Subgroup by the JE Leads.

Consistency Panels will adhere to the following checklist:

|  |  |
| --- | --- |
| **FOR EACH MATCHED JOB / GROUP OF JOBS:** | **YES/NO** |
| Has a consistency checking exercise been carried out (in line with the NHS Fife Consistency Checking Protocol) |  |
| **WHERE A GROUP OF JOBS ARE CONSISTENCY CHECKED ACROSS THE GROUP OF JOBS:** |  |
| Have rationales been correctly recorded on TURAS (including reference numbers, panel member codes, job statements and relevant evidence against all factors)? |  |
| Have posts been matched against profiles from the same occupational grouping\*? |  |
| Is there consistency across matching panels dealing with similar jobs within same occupational grouping and job family\*?  |  |
| Have jobs which were previously in the same grade or at the same level of work, been matched to profiles in the same pay band, OR is there a clear reason why this is not the case? |  |
| **FOR CONSISTENCY CHECKING OF ALL OTHER MATCHED JOBS FOR EACH MATCHED JOB:** |  |
| Is the profile used appropriate to the job? |  |
| Are variations legitimate in the light of the job information? |  |
| Wherea reviewed profile has subsequently been published, the outcome has not substantially changed? |  |
| **FOR CONSISTENCY CHECKING OF ALL NON-MATCHED JOBS FOR EACH NON-MATCHED JOB (before sending a JAQ to be completed for local evaluation):** |  |
| This is really a non-match (i.e. the panel have not made an error)? |  |
| Where a new or reviewed profile has subsequently been published, this does not affect the matching outcome? |  |
| The job is not suitable for the hybrid procedure, (where use of this has been agreed locally), for example, if the non-match is on one or two factors and it is agreed that the profile band is the correct one for the job? |  |
| **DEALING WITH QUERIES ARISING FROM THE ABOVE CHECKS:** |  |
| Where the consistency checking panel have queries regarding the evaluation and matching (e.g. regarding evidence, questions put to manager, profile used) the job description should be sent back to the same matching panel with queries identified?  |  |
| **CONSISTENCY CHECK RESULTING IN DIFFERENT OUTCOME TO THAT REACHED BY MATCHING PANEL:** |  |
| Inconsistencies should be referred to the original matching panel with queries / comments to inform the consistency panel decision |  |
| The matching panel should then review the match or evaluation and answer any queries as appropriate |  |
| Outcomes should be compared with ALL relevant national profiles; all within the same job group AND pay band  |  |
| The consistency checking panel must be satisfied that the revised outcome is appropriate |  |
| Where there is any disagreement between the original panel and the consistency panel, the matter should be referred to the NHS Fife JE Leads to consider |  |
| Comparing profile used and/or outcome with neighbouring NHS organisations with similar roles? |  |
| Refer to the STAC Job Evaluation Sub Group , in the case of major issues/queries via the JE leads? |  |
| **FINAL CHECK WHEN ALL THE ABOVE ARE RESOLVED, CONSISTENCY PANELS SHOULD BE SATISFIED THAT:** |  |
| Jobs in occupational groupings have come out where the national profiles indicated they should for the type of jobs, OR there is a clear reason why this is not the case?  |  |
| The distribution of the group of jobs across relevant pay bands seems reasonable for the organisation. |  |

\* *Job family* and *occupational grouping* as defined in the Matching Procedure – see *Job Evaluation Handbook*, seventh edition, September 2018 (amended April 2020), page 84.