
NHS STAFF COUNCIL JOB EVALUATION GROUP

GUIDANCE ON MATCHING OR EVALUATING FACTOR 2

Background and introduction

The NHS Staff Council Job Evaluation Group (JEG) has, as part of its responsibility of review of the relevance and fitness for purpose of the NHS Job Evaluation (JE) Scheme, updated the guidance to Factor 2 in Chapter 5 of the NHS Job Evaluation Handbook (JE Handbook) in the light of developments and changes in educational and vocational qualifications in the UK.

JEG is also aware that there are concerns expressed by job evaluation panels relating to Factor 2, which may have led to some short cuts being taken. One of the most common short cuts is that of matching or evaluating factors 2 and 12 in isolation of the other factors, which will often lead to panels “shoe-horning” roles into profiles and may lead to an inaccurate band outcome.

It is not advisable to match or evaluate 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, should a qualification be set 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.

Job descriptions and person specifications

A good job description is needed for a robust job matching outcome, which should clearly articulate the requirements and competence for the role and a person specification stipulating the essential qualifications and/or experience required to be employed in the role. The JE Handbook, in chapter 10, states:

- “Up-to-date agreed job descriptions and person specifications are required to facilitate matching and make it accurate and efficient.
- Having up-to-date, agreed job descriptions is good HR practice and their main purpose is to ensure that employees and their line managers have a common understanding of what is required of the jobholder. The required information is generally set out in the form of a list of job duties.
- Similarly, having person specifications available for all posts is good HR practice because it facilitates the recruitment process.
- Job descriptions should not follow the national JE profile format as profiles are not job descriptions and do not fulfil the main purpose of having job descriptions.
- Information required for matching, which is not usually included in job descriptions or person specifications (for example, in relation to the effort and environment factors) can be collected by other means, for instance, by short questionnaire or through oral evidence.”

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It also states in chapter 5:

“Advice from Staff Council makes it clear that person specifications are not always enough to assess the level of knowledge required for a job.”

The handbook further states in chapter 5 on the issue of qualifications and experience that all aspects of acquiring greater knowledge should be taken into account:

“This factor measures all the forms of knowledge required to fulfil the job responsibilities satisfactorily. This includes theoretical and practical knowledge; professional, specialist or technical knowledge; and knowledge of the policies, practices and procedures associated with the job. It takes account of the educational level normally expected as well as the equivalent level of knowledge gained without undertaking a formal course of study; and the practical experience required to fulfil the job responsibilities satisfactorily.

- 2.1** The factor level definitions are written in terms of the knowledge actually required to perform the job at each level. This is to ensure that the knowledge is accurately evaluated and no indirect discrimination occurs through use of qualifications, which may understate or overstate the knowledge required.
- 2.2** Qualifications can provide a useful indicator of the level of knowledge required. Training towards qualifications is also one means of acquiring the knowledge required for a job (other means include on-the-job training, short courses and experience). Indicative qualifications are given in the guidance notes. This does not mean that there is a requirement to hold any particular qualification for a job to be scored at the level in question, but that the knowledge required must be of an equivalent level to the stipulated qualification.
- 2.3** On the other hand, if a job does genuinely require the knowledge acquired through a specified formal qualification, then this should be taken into account when assessing the job.
- 2.4** It is important that panels clarify what qualifications and/or experience are actually needed for a job and ensure they understand what the qualification or experience is – this may involve asking questions of the job advisors to ensure that the level expected of someone is the level at which the job will be carried out competently, rather than that relating to recruitment level.”

Key points

- The correct way to identify a suitable profile is by using the principle purpose of the job on the job description and comparing this with the job statement at the top of a profile.
- 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.
- JEG would strongly advise against matching factors 2 and 12 first and then making a decision based solely on those factors.
- Remember that, because the KTE factor is the most heavily-weighted in terms of points, if the information is assessed wrongly the outcome may be unreliable.
- If your current practices, in partnership, do not comply with this advice, JEG recommends that you revisit matching outcomes to ensure they are robust.