

**BLOCKED LOCAL MATCHING/EVALUATION/CONSISTENCY CHECKING  
PROTOCOL**

1. Where the parties within an employing organisation (Management and Staff Side) have been unable to conclude the matching and/or evaluation or consistency checking process locally for any post or group of posts, either of the parties may approach the Strategic Health Authority (SHA) Agenda for Change (AFC) Leads for assistance under this protocol.
2. If not resolved through initial discussion with the AFC Leads and if the situation is agreed by all parties to be genuinely intractable, arrangements will be made for a meeting of the interested parties. (That may on occasions have to be by video or telephone conference). The directly interested party/parties will be asked by the SHA AFC Leads to submit relevant documentation (job descriptions, matching/evaluation outcomes, consistency checking records).
3. If the issues are not resolved through the meeting of the parties, then the SHA AFC Leads shall establish a panel to undertake matching or evaluation or consistency checking of the job or group of jobs.
4. The panel will be drawn from a pool of matching and evaluation panelists drawn in equal numbers from management and staff side. Panel members will be provided by national JE leads and will not include panelists from the Trusts within the same SHA area or anyone connected with the same job group, directorate or organisational department type.
5. All panelists will be qualified and experienced in both matching and/or evaluation processes. In addition, the panel will be assisted by an independent job evaluation expert (or if necessary a Job Evaluation Group (JEG) partnership pair).
6. The membership of the panel will be the subject of consultation with all the relevant parties so that there is consensus and confidence in the process and those participating in it.
7. Arrangements for the convening and meeting of the panel will be made by the SHA and the costs met by them. Similarly, the same bodies shall be responsible for the notification of the outcome of the matching or evaluation process.
8. Terms of reference shall be drawn up by the SHA AfC Leads and trust in partnership, setting out clearly what is expected from the panel and what happens once an agreed outcome is reached. This will be signed up to by

management side and staff side representatives locally prior to the panel starting their deliberations.

9. Job advisors (representatives of the post being considered and of line management) shall be made available to the panel to answer any questions or points of clarification.
10. Exceptionally, for example if matters emerge from this process that would benefit from national advice, the matters may be referred to the Staff Council Executive for consideration who may in turn, at their discretion, seek advice from JEG.
11. In the event that a post holder/s ask for the outcome to be reviewed, the AFC Leads may refer the review to another panel convened in accordance with the process described in paragraphs 4 and 5.
12. In order to trigger the review process, evidence setting out the reasons for the review and to support the areas of difference must be submitted in writing to the Staff Council Executive via the SHA. The Staff Council Executive reserves the right to decline the request if it is clear after careful consideration and consultation with the previous external panel(s) that no evidence which has not previously been examined has been presented.
13. A meeting of all parties to discuss the issues associated with the review may be requested and convened by the SHA AfC Leads.
14. All outcomes shall be the subject of consistency checking in accordance with the process described in the Job Evaluation Handbook.
15. SHA AFC Leads may also convene consistency checking panels in the event of inconsistent outcomes being unresolved by local processes.
16. The arrangements for consistency checking will be the same as those for matching/evaluation as described in paragraphs 4 to 8 of this protocol.
17. Following consistency checking the outcome will be implemented by the organisation.

NB 'AFC LEADS' refers to the Management and Staff Side Leads at SHAs

Staff Council Executive

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