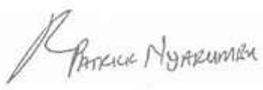




Job Evaluation Policy

Policy number and category	HR14	People and Culture
Version number and date	2	March 2026
Ratifying committee or executive director	Transforming Culture and Staff Experience Sub Committee	
Date ratified	March 2026	
Next anticipated review	March 2029	
Executive director	Executive Director of Strategy, People and Partnerships	
Policy lead	People Service Delivery Manager	
Policy author	As above	
Exec Sign off Signature (electronic)		
Disclosable under Freedom of Information Act 2000	Yes	

Policy Context

Birmingham and Solihull Mental Health Foundation Trust (BSMHFT) is committed to the operation of a fair, consistent, and equitable job evaluation scheme, which is in line with our Trust values of Compassionate, Inclusive and Committed. Our values describe our core ethics and principles.

This policy applies to all directly employed Trust staff employed under Agenda for Change (AfC) terms and conditions of service. This policy does not apply to directors, medical posts, and Very Senior Manager positions (VSM).

Policy Requirement

Our Job Evaluation Policy outlines the Trust's local procedures for job evaluation within the national Agenda for Change (AFC) framework, ensuring an effective process that meets the Trust's needs.

Change Record

Date	Version	Author (Name and Role)	Reasons for review / Changes incorporated	Ratifying Committee
March 2026	2.0	People Service Delivery Manager	Routine review of policy in line with Policy Development Policy. Substantive change in line with feedback and developing practice.	TCSE

Contents

1.	Introduction.....	3
1.1.	Rationale	3
1.2.	Scope	3
1.3.	Principles.....	3
2.	Policy.....	4
3.	Procedure.....	4
3.1.	New Posts.....	4
3.2.	Established Posts.....	5
3.3.	Submitting Job Evaluation Requests	5
3.4.	Posts not Matched to a National Profile (Local Job Evaluation).....	7
3.5.	Banding Changes.....	8
3.6.	Organisational Change.....	8
3.7.	Review of Job Description and Person Specification Post-Evaluation	8
3.8.	Panel Composition	8
3.9.	Panel Competency and CPD Requirements.....	9
3.10.	Consistency Checking.....	9
3.11.	Job Evaluation Leads	9
3.12.	Appeals	10
4.	Responsibilities	11
5.	Development and Consultation Process	12
6.	Reference Documents	13
7.	Bibliography.....	13
8.	Glossary	14
9.	Audit and Assurance:.....	14
	Appendix 1: Equality Analysis Screening Form	15

1. Introduction

1.1. Rationale

Birmingham and Solihull Mental Health NHS Foundation Trust participates in the National NHS Job Evaluation Scheme to ensure fairness, consistency, and equality in how jobs are assessed and pay bands are determined. The national scheme, agreed in partnership by the NHS Staff Council, provides a single, transparent framework for evaluating all roles covered by the Agenda for Change Terms and Conditions of Service. This approach supports equal pay for work of equal value and helps prevent discrimination across the NHS.

The NHS Job Evaluation Handbook is the definitive guide for interpreting and applying the national Job Evaluation Scheme. The Handbook is binding on all local matching and evaluation panels and must be followed to ensure that our processes align with national standards and legal requirements.

This local policy sets out how the national Job Evaluation Scheme and Handbook are implemented within our Trust. It explains our procedures for job matching, evaluation, reviews, and consistency checking, ensuring that all staff and managers understand their roles and responsibilities. The policy ensures that our local practice is compliant with national requirements, supports partnership working, and provides a clear, accessible process for all colleagues. This policy will be reviewed at least every three years and operational guidance found in the CONNECT Knowledge Base and Resource Hub will be updated on a rolling basis to reflect national guidance.

1.2. Scope

This policy applies to all directly employed Trust staff employed under Agenda for Change (AfC) terms and conditions of service.

The NHS Job Evaluation Scheme, and therefore this policy, does not apply to Very Senior Manager (VSM) positions, medical staff or posts of workers not employed by the Trust.

1.3. Principles

Birmingham and Solihull Mental Health Foundation Trust is committed to creating a positive workplace culture where everyone takes responsibility for their behaviour and contributes to a supportive environment. All BSMHFT people will treat each other fairly, consistently and resolve matters promptly.

Our people are guided by the people of our community which are:



2. Policy

The Trust is committed to ensuring that all job evaluation processes are fair, transparent, and consistent, in line with the National NHS Job Evaluation Scheme promoting equality of pay within our Trust and across the NHS.

We recognise that robust job evaluation is essential for delivering equal pay for work of equal value, supporting staff morale, and maintaining public trust. The Trust will:

- Apply the national NHS Job Evaluation Scheme to all relevant posts, following the procedures and guidance set out in the National Handbook.
- Work in partnership with staff representatives at every stage of the job evaluation process, ensuring that decisions are made jointly and transparently.
- Promote equality, diversity, and inclusion by ensuring that job evaluation outcomes are free from bias and discrimination.
- Provide clear information and support to all staff and managers, so that everyone understands how job evaluation works and how to access a review if required.
- Regularly review and update local procedures to reflect changes in national guidance and best practice, ensuring ongoing compliance and quality.
- Work to ensure that all Job Evaluation requests are handled in a timely manner, monitored against Key Performance Indicators, to ensure the quality of experience for our people.

3. Procedure

3.1. New Posts

Prior to seeking approval to recruit to a new role, the recruiting manager will be responsible for drafting a comprehensive job description and person specification which accurately reflect the duties required of the post and the skills and abilities required of the person in the post. The most up to date templates associated with Job Evaluation can be accessed via the CONNECT Knowledge Base and Resource Hub:

https://nhs.sharepoint.com/sites/RXT_PeopleandCulture/SitePages/People-and-Culture-Templates,-Forms-and-Toolkits.aspx.

In doing so, the line manager must first review existing roles within the Trust (or by Trusts within the Birmingham and Solihull ICS) to identify whether a previously evaluated Job

Description and Person Specification can be used, with only minor contextual changes (for instance, locations, team names etc.) If an existent Job Description and Person Specification is found and documentary evidence is provided to demonstrate that the post was evaluated within the previous two calendar years, then the post will not require formal job evaluation.

Managers should seek advice from the People Team to ensure alignment with the Workforce Plan, the quality of the job description and to ensure that the template and format are correct prior to submitting the job description and person specification for job evaluation.

3.2. Established Posts

An established post is any post that has previously been job evaluated and could be occupied or vacant.

If an individual (or group of individuals holding the same post) believes that their role has significantly changed they should request a time to review their Job Description and Person Specification with their line manager. Together the line manager and employee will prepare a revised Job Description and Person Specification, agreeing on the nature of the changes to be included.

It should be noted that where an individual has undertaken additional duties for the purpose of personal development, the original post is unaltered, and the post will not be considered for rebanding. The individual may choose to discontinue the performance of such duties, or such duties may be withdrawn by the line manager following discussion.

If an individual (or group) is unable to get the agreement of their line manager that their post has changed, they should contact a People Team representative who will organise a meeting to resolve the issue. If no agreement can be reached, the individual has the right to pursue matters under the Trust's Grievance Policy.

A revised job description cannot be submitted for at least twelve months from the date of notification of the outcome to the line manager except where there is clear evidence that service needs have changed significantly which impact on the post or where a job description has changed following the 6-12 month bedding in period for a new post.

3.3. Submitting Job Evaluation Requests

For both requests for evaluation for New Posts and Established Posts, once the initial review of the role is complete, the line manager will prepare a final document pack that will include:

- Job Evaluation Request Form (New Post or Established Post)
- Original Job Description and Person Specification
- Updated Job Description and Person Specification with changes clearly identified
- Optionally, any supporting documentation (for example a business case, similar Job Descriptions etc.)

The most up to date templates associated with Job Evaluation can be accessed via CONNECT Knowledge Base and Resource Hub:

https://nhs.sharepoint.com/sites/RXT_PeopleandCulture/SitePages/People-and-Culture-Templates,-Forms-and-Toolkits.aspx.

In alignment with the National Job Evaluation Group guidance, the Trust aims to process all Job Evaluation Requests within 90 calendar days. This timeline includes all preparation work undertaken by a line manager (and the postholder for established posts) and concludes once the post has an evaluation panel outcome.

For established posts, the line manager must ensure that affected colleagues are kept up to date with the progression of the job evaluation process, usually through the recorded routine management supervision process.

The line manager will then seek approval by distributing the documentation to the following approvers (as outlined on the Request Form):

Line Manager	The line manager confirms that the Job Description and Person Specification meets the needs of the service, is accurate and has been appropriately discussed with the relevant chief clinical professional (for clinical posts).
People and Culture Team	The People and Culture team provide confirmation that the documentation pack is complete, that workforce planning implications have been considered and that the post is ready for evaluation.
Financial Management Teams	The Financial Management Team will confirm that appropriate budget and budget-holder authority are in place for the post.
Associate Director or Equivalent	The Associate Director, or equivalent, confirms that the proposed post aligns with the strategic direction of the service, provides budgetary authority and assures that all previous steps of the process have been completed.
Executive	For Established Posts only, the Trust Executive confirms approval of the proposed redesign of the role in line with the Trust strategy.

Once full approval has been received, the line manager must submit the approved document pack to bsmhft.hrsupport@nhs.net to be consideration by a Job Evaluation panel.

In the event that full approval cannot be achieved, the line manager must review the situation with the support of the People and Culture Team to identify the appropriate next steps. This process may involve reviewing the proposed Job Description and Person Specification and, if required, evaluating the team structure and work allocations in accordance with the Organisational Change Policy.

It remains the role of the line manager to keep the post-holder/s updated as their request progresses.

3.4. Posts not Matched to a National Profile (Local Job Evaluation)

Where a Job Evaluation panel has been unsuccessful in matching a post 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, a post may be referred to Local Job Evaluation.

- A draft Job Analysis Questionnaire (JAQ) must be completed by the postholder (for established posts) or post-holding representative (for established groups of posts) or the line manager (for new posts or vacant established posts).
- The line manager and post-holder/post-holding representative (where applicable) will then be invited to attend a Job Analysis Meeting by two trained job analysts, one from management side and one from staff side to check, amend and verify the Job Analysis Questionnaire.
- A post-holding representative, if representing a group of staff may be accompanied by another postholder for support if they so wish.

- Once agreed, the Job Analysis Questionnaire is signed off by the jobholder, line manager and both job analysts. The agreed and signed off Job Analysis Questionnaire is evaluated by a job evaluation panel in the normal way.

3.5. Banding Changes

When a new role is successfully Job Evaluated, appointments made to the post will usually be to the starting scale point of the band in accordance with the Trust Recruitment and Pay Policies.

When an occupied, established role is evaluated to a higher band then pay will be set at either the starting point of the new pay band, or, if this would result in no pay increase, to whichever point in the band that would deliver an increase in pay (ie. middle or top. By reference to basic pay plus any recruitment and retention premium if applicable). The pay increase will be backdated to the date of the change in duties, as agreed by line manager and post-holder and listed on the Job Evaluation Request Form (Established Posts).

When an occupied, established role is evaluated to a lower band then the postholders will be receive pay protection in accordance with the Management of Organisational Change Policy.

3.6. Organisational Change

Where an organisational change programme introduces new or changed posts, change leaders must carefully schedule time into business cases to enable time for Job Evaluation processes. For detailed guidance, change leaders should review see the Organisational Change Policy (HR22) and seek advice from the People Operations Team.

Specifically in the context of Transfer of Undertakings Protection of Employment (TUPE) programmes, the Trust ensures all staff are treated as transferring in the same employment, supporting equal pay and consistency. However, as a matter of course, once the TUPE programme is completed, managers will ensure that posts are carefully reviewed to ensure that job evaluations are up to date and subject to the usual consistency checking process to ensure pay equality and clarity across roles in the Trust.

3.7. Review of Job Description and Person Specification Post-Evaluation

Once a post has been successfully Job Evaluated and a period of 12 months has passed, the Line Manager may wish to review the job with the postholder to determine whether it accurately reflects the role being undertaken or whether any further changes need to be made.

If there are no significant changes, then the post-holder will continue to perform their duties in accordance with the existing Job Description and Person Specification.

Where there are significant changes, the post should re-enter the Job Evaluation process for Established Posts to be re-evaluated.

3.8. Panel Composition

A Job Evaluation panel will consist of four panel members, two staff side and two management representatives. In the event that one panel member is unable to join the panel for unavoidable reasons, every effort should be taken to enable the panel to proceed as planned which may include proceeding with a reduced panel of the remaining three

panel members only. When evaluating a post in line with an appeal process, the majority of a Job Evaluation panel must not have been involved in the initial evaluation.

A Consistency Check will be undertaken by two panel members, one staff side and one management representative. In the event that one panel member is unable to join the panel due to unavoidable reasons, the panel would need to be rescheduled.

A Job Analysis Meeting, supporting evaluation for a post not matched, will always be undertaken by a minimum of two trained job analysts, one of whom will be a Staff Side representative. In the event that one Job Analyst is unable to join the meeting due to unavoidable reasons, the meeting would need to be rescheduled.

Panel members will be supported by line management to be released from their routine duties to prepare for and attend panel meetings.

3.9. Panel Competency and CPD Requirements

The following competency requirements apply:

Competency Area	People and Culture Team Members	Job Evaluation Panel Members	Job Analysts	Consistency Checkers
NHS Job Matching	✓	✓	✓	✓
NHS Job Analysis and Evaluation	Optionally	Optionally	✓	✓
NHS Job Evaluation Consistency Checking	Optionally	Optionally	Optionally	✓
Ongoing Continued Professional Development	✓	✓	✓	✓

All staff involved in the Job Evaluation process will be encouraged to participate in ongoing development activities, with mandatory refresher training every 3 years, and are strongly encouraged to join the NHS Job Evaluation Community of Practice.

3.10. Consistency Checking

Consistency checking is a critical component of the NHS Job Evaluation Scheme, ensuring that job evaluation outcomes are fair, robust, and compliant with equal pay legislation.

Regular consistency checks will be conducted internally by an appropriately trained management and staff representative, to review local matching and evaluations for consistency, while external checks will be performed using national benchmark evaluations to ensure jobs are aligned with comparable positions.

3.11. Job Evaluation Leads

The Trust will appoint at least one management-side and one staff-side Job Evaluation Lead to ensure the successful implementation of consistent Job Evaluation practices across the Trust.

Working in partnership, the Job Evaluations Leads oversee the:

- Coordination and delivery of all Job Evaluation activities, ensuring compliance with national guidance and local policy.
- Forecasting of panel demand quarterly, considering planned organisational changes and previous activity to support effective scheduling.
- Maintenance of a register of trained Job Evaluation practitioners and organise panel rotas.
- Quality assurance of job information and consistency checking of outcomes.
- Facilitation of Job Evaluation training and act as a Subject Matter Expert for Job Evaluation advice.
- Accuracy of record-keeping and equality monitoring.

3.12. Appeals

Where the line manager (for new posts or vacant established posts) or the post holder/s (for occupied established posts) are dissatisfied with the outcome of a job evaluation, they may submit an appeal.

A Job Evaluation appeal consists of three stages:

- **Appeal Submission:** The postholder or a representative of a group of postholder/s (for established occupied posts) or the line manager (for new posts or vacant established posts) will submit a Job Evaluation Appeal Form and supporting documentation to their line manager. The form and supporting documentation must be submitted within 3 calendar months of the outcome of the initial Job Evaluation panel being confirmed. The most up to date templates associated with Job Evaluation can be accessed via the CONNECT Knowledge Base and Resource Hub: https://nhs.sharepoint.com/sites/RXT_PeopleandCulture/SitePages/People-and-Culture-Templates,-Forms-and-Toolkits.aspx.
- **Informal Stage:** The line manager will arrange an initial meeting between the postholder (for established posts only), line manager and a Job Evaluation Lead. This stage aims to resolve concerns without the need for re-evaluation.
- **Review by a Job Evaluation Panel:** If the issue is not resolved informally, a Job Evaluation panel (with a majority of members different from the original panel) will reconsider the case, following the standard matching or evaluation procedure. The review panel will only consider evidence relevant to the factors in dispute.

All review outcomes are subject to consistency checking before being confirmed.

The decision of the Job Evaluation Panel considering an appeal is final, and there is no further right of appeal. Appeals will not be accepted out of time, unless due to exceptional circumstances.

Concerns about the process itself (not the outcome) may be raised through the Trust's grievance procedure.

4. Responsibilities

Post(s)	Responsibilities
All Employees	<p>Request a review when roles change significantly by agreeing changes with your manager, submitting evidence, and triggering re-evaluation.</p> <p>Engage constructively in reviews or appeals by submitting clear evidence on disputed factors within set timescales and using informal routes first.</p> <p>Provide accurate job details by completing JAQs when needed.</p>
Line Managers	<p>Keep job descriptions and person specifications up to date, ensuring they describe duties accurately and are agreed with postholders.</p> <p>Initiate job evaluation requests for new or changed roles by compiling the full document pack and routing for approvals.</p> <p>Support panels by answering queries, communicating outcomes, and implementing revised banding and start dates, including backdating where required.</p>
Associate Directors or Equivalent	<p>Approve proposed posts or changes, ensuring they align with service strategy and budget before submission.</p> <p>Promote partnership working by releasing trained staff for panels and embedding agreed procedures.</p>
Job Evaluation Panel Members	<p>Apply the national Job Evaluation Scheme fairly by matching profiles or evaluating JAQs, considering all factors and avoiding bias.</p> <p>Work in trained, joint panels (staff side and management), aiming for consensus and maintaining a clear audit trail.</p> <p>Gather and record sufficient evidence, probing unclear points and documenting rationales for each factor.</p>
Job Evaluation Leads	<p>Oversee JE governance and quality by coordinating activities, maintaining registers, and ensuring compliance with policy.</p> <p>Plan capacity and training by forecasting demand, maintaining trained practitioners, and organising refresher courses.</p> <p>Provide expert advice and manage appeals, escalating only when local resolution is exhausted.</p>
People and Culture Team	<p>Advise managers and staff on Job Evaluation processes and signpost national guidance and training.</p> <p>Validate submissions by checking packs are complete and aligned with workforce plans before scheduling panels.</p> <p>Arrange and administer panels, ensuring practitioner availability and managing communications and records.</p> <p>Maintain Job Evaluation records and systems for audit and reporting, supporting equal pay compliance.</p>

Post(s)	Responsibilities
Trust Board	<p>Assure equal pay and consistency by checking outcomes, records, and risk mitigation, especially during organisational change.</p> <p>Ensure capacity and partnership working by holding the organisation accountable for trained Job Evaluation resources and genuine collaboration.</p> <p>Oversee escalation and transparency by ensuring clear review and appeal routes and receiving monitoring reports.</p>

5. Development and Consultation Process

Consultation summary		
Date policy issued for consultation	February 2026	
Number of versions produced for consultation	1	
Committees or meetings where this policy was formally discussed		
Joint Operational Staffing Committee JOSC		
Policy Development Management Group PDMG		
Where else presented	Summary of feedback	Actions / Response
General Consultation	Request that the principles section be updated to ensure that the Values are referenced clearly in line with People Policy practice.	Updated appropriately.
Staff Side	Recommendation to refer to the Trust in the plural.	Trust terminology to remain singular in line with NHS England guidance.
Staff Side	Requests for clarification or amendments to operational elements (e.g., suitability of ICS posts, assurance testing, approval timelines).	Noted as operational processes covered in SOPs or KPIs; not appropriate for inclusion in the policy.
Staff Side	Recommendations for wording changes or clarity (e.g., Finance wording, executive authority, line-manager updates, responsibility post-org change).	Accepted where appropriate; wording updated for accuracy and clarity.
Staff Side	Requests relating to evaluation panel requirements and appeals wording.	Clarifications added where aligned to guidance.

6. Reference Documents

The following internal documents are referenced by this policy and can be accessed via CONNECT (https://nhs.sharepoint.com/sites/RXT_Connect):

- Resolution of Grievance and Disputes Policy
- Organisational Change Policy
- Pay Policy
- Recruitment and Selection Policy

The following Standard Operating Procedures relate to this policy and can be accessed via CONNECT Knowledge Base and Resource Hub:

https://nhs.sharepoint.com/sites/RXT_PeopleandCulture/SitePages/People-and-Culture-Templates,-Forms-and-Toolkits.aspx.

- Job Evaluation for New Posts (SOP-JE-001)
- Job Evaluation for Established Posts (SOP-JE-002)
- Job Evaluation for Unmatched Posts (SOP-JE-003)
- Job Evaluation Appeals (SOP-JE-004)
- Referral to National Job Evaluation Group Support (SOP-JE-005)

The following external documents are referenced in this policy and can be accessed externally:

- NHS Job Evaluation Handbook (<https://www.nhsemployers.org/publications/nhs-job-evaluation-handbook>)
- Agenda for Change Terms and Conditions of Service (<https://www.nhsemployers.org/publications/tchandbook>)
- National job profiles (<https://www.nhsemployers.org/articles/national-job-profiles>)

7. Bibliography

The following resources were considered in the development of this policy:

- NHS Employers Job Evaluation Resources (<https://www.nhsemployers.org/topics/pay-pensions-and-reward/job-evaluation>)
- NHS Job Evaluation Group Advice (<https://www.nhsemployers.org/articles/job-evaluation-group-advice>)
- NHS Employers Job Evaluation Training (<https://www.nhsemployers.org/articles/job-evaluation-training>)

8. Glossary

Term	Definition
Job Evaluation	The means of determining pay bands for posts
National Job Profiles	National job profiles have been developed and apply to particular staff groups such as administrative and clerical, nursing and allied health professionals allowing jobs to be evaluated to determine the band outcome; they are not intended to be used as job descriptions. National profiles can be accessed at www.nhsemployers.org
Benchmarking	A comparison analysis of job evaluation factors between the job description submitted and another similar job description which has already been formally matched, and consistency checked to confirm the same outcome.
Job Analysis Questionnaire (JAQ)	In very exceptional circumstances, jobs which fail to match a national profile or where there is no national profile exists; the line manager will be required to complete a detailed JAQ with a trained practitioner.

9. Audit and Assurance:

Element to be monitored	Lead	Tool	Frequency	Reporting Committee
Job Evaluation Activity Levels	Job Evaluation Leads	Job Evaluation Trackers IJES Data	Quarterly	TCSE
Job Evaluation Outcomes including Equality Impact	Job Evaluation Leads	Job Evaluation Trackers IJES Data	Quarterly	TCSE
Timeliness of Job Evaluation Process	Job Evaluation Leads	Job Evaluation Trackers	Quarterly	TCSE
Panellist Training and Panel Compliance with Composition Requirements	Job Evaluation Leads	Job Evaluation Trackers	Quarterly	TCSE

Appendix 1: Equality Analysis Screening Form

Title of Policy	Job Evaluation Policy		
Person Completing this policy	Scott Allcock	Role or title	Assistant People Partner
Division	Strategy, People and Partnerships	Service Area	People Operations
Date Started	March 2026	Date completed	March 2026
Main purpose and aims of the policy and how it fits in with the wider strategic aims and objectives of the organisation.			
<p>The Job Evaluation Policy ensures that all roles covered by Agenda for Change (AfC) are evaluated fairly, consistently, and transparently, supporting equal pay for work of equal value. It aligns with the Trust's strategic aims of promoting compassionate, inclusive, and committed values, and complies with national NHS Job Evaluation Scheme requirements. The policy is designed to prevent discrimination and support staff morale, public trust, and legal compliance.</p>			
Who will benefit from the policy?			
<p>Directly employed staff under AfC terms and conditions will benefit from fair and consistent job evaluation. Managers and staff representatives gain clarity and confidence in the process. Service users and the wider community benefit indirectly from a motivated, fairly treated workforce. The organisation benefits from reduced risk of equal pay claims and improved staff engagement.</p>			
Does the policy affect service users, employees or the wider community?			
<i>Add any data you have on the groups affected split by Protected characteristic in the boxes below. Highlight how you have used the data to reduce any noted inequalities going forward</i>			
<p>The policy primarily affects employees but also impacts service delivery and organisational culture. By ensuring equal pay and fair evaluation, it helps reduce inequalities in recruitment, progression, and retention. Data on protected characteristics (age, disability, gender, race, etc.) should be monitored to identify and address any disproportionate impacts. NHS Employers recommend regular equality monitoring and reporting as part of job evaluation governance.</p>			
Does the policy significantly affect service delivery, business processes or policy?			
<i>How will these reduce inequality?</i>			
<p>The policy standardises job evaluation, reducing subjective decision-making and potential bias. It requires partnership working, regular consistency checks, and appeals processes. These measures help to reduce inequality and support compliance with the Equality Act 2010 and NHS England guidance.</p>			

Does it involve a significant commitment of resources? How will these reduce inequality?				
The policy standardises job evaluation, reducing subjective decision-making and potential bias. It requires partnership working, regular consistency checks, and appeals processes. These measures help to reduce inequality and support compliance with the Equality Act 2010 and NHS England guidance.				
Does the policy relate to an area where there are known inequalities? (e.g. seclusion, accessibility, recruitment & progression)				
Job evaluation is a key area where inequalities can arise, especially in recruitment and progression. The policy addresses these by: <ul style="list-style-type: none"> • Applying national profiles and factor plans that are designed to be gender-neutral and non-discriminatory. • Ensuring reasonable adjustments for disabled staff. • Promoting flexible working and inclusive practices. • Monitoring outcomes by protected characteristics and taking action to address any disproportionalities. 				
Impacts on different Personal Protected Characteristics – Helpful Questions:				
<i>Does this policy promote equality of opportunity?</i> <i>Eliminate discrimination?</i> <i>Eliminate harassment?</i> <i>Eliminate victimisation?</i>			<i>Promote good community relations?</i> <i>Promote positive attitudes towards disabled people?</i> <i>Consider more favourable treatment of disabled people?</i> <i>Promote involvement and consultation?</i> <i>Protect and promote human rights?</i>	
Please click in the relevant impact box and include relevant data				
Personal Protected Characteristic	No/Minimum Impact	Negative Impact	Positive Impact	Please list details or evidence of why there might be a positive, negative or no impact on protected characteristics.
Age			✓	The Job Evaluation Policy is designed to be age-neutral, applying equally to staff of all ages. There is no evidence that the policy creates barriers or advantages for any age group as effective job evaluation ensures that remuneration is allocated on the basis of the work undertaken, rather than overall NHS tenure, which could otherwise be discriminatory on the basis of age.
Including children and people over 65 Is it easy for someone of any age to find out about your service or access your policy? Are you able to justify the legal or lawful reasons when your service excludes certain age groups				

Disability	✓			There are limited inter-relationships between disability and job evaluation, however, by ensuring that posts are remunerated based on the duties held will ensure that a disabled colleague receives equal pay for their work, whether that work is adjusted under the Equality Act 2010 or otherwise.
Including those with physical or sensory impairments, those with learning disabilities and those with mental health issues Do you currently monitor who has a disability so that you know how well your service is being used by people with a disability? Are you making reasonable adjustment to meet the needs of the staff, service users, carers and families?				
Gender			✓	The policy is explicitly designed to eliminate gender bias and support equal pay for work of equal value, benefiting all genders including transgender staff. National and local monitoring (e.g., WRES, WDES) is in place to identify and address any disparities.
This can include male and female or someone who has completed the gender reassignment process from one sex to another Do you have flexible working arrangements for either sex? Is it easier for either men or women to access your policy?				
Marriage or Civil Partnerships	✓			There is no evidence that the policy impacts staff differently based on marital or partnership status. The policy does not differentiate or exclude on these grounds, and inclusive terminology is used throughout.
People who are in a Civil Partnerships must be treated equally to married couples on a wide range of legal matters Are the documents and information provided for your service reflecting the appropriate terminology for marriage and civil partnerships?				
Pregnancy or Maternity	✓			There is no evidence that the policy impacts staff differently based on pregnancy or maternity. The policy does not differentiate or exclude on these grounds, and inclusive terminology is used throughout.
This includes women having a baby and women just after they have had a baby Does your service accommodate the needs of expectant and post-natal mothers both as staff and service users? Can your service treat staff and patients with dignity and respect relation into pregnancy and maternity?				
Race or Ethnicity			✓	The policy is explicitly designed to eliminate racial bias and support equal pay for work of equal value, benefiting colleagues of all ethnicities. National and local monitoring (e.g., WRES, WDES) is in place to identify and address any disparities.
Including Gypsy or Roma people, Irish people, those of mixed heritage, asylum seekers and refugees				

<p>What training does staff have to respond to the cultural needs of different ethnic groups? What arrangements are in place to communicate with people who do not have English as a first language?</p>				
Religion or Belief	✓			There is no evidence that the policy impacts staff differently based on religion or belief. The policy does not differentiate or exclude on these grounds, and inclusive terminology is used throughout.
<p>Including humanists and non-believers Is there easy access to a prayer or quiet room to your service delivery area? When organising events – Do you take necessary steps to make sure that spiritual requirements are met?</p>				
Sexual Orientation	✓			There is no evidence that the policy impacts staff differently based on sexual orientation. The policy does not differentiate or exclude on these grounds, and inclusive terminology is used throughout.
<p>Including gay men, lesbians and bisexual people Does your service use visual images that could be people from any background or are the images mainly heterosexual couples? Does staff in your workplace feel comfortable about being 'out' or would office culture make them feel this might not be a good idea?</p>				
Transgender or Gender Reassignment	✓			There is no evidence that the policy impacts staff differently based on their gender identity, beyond that detailed above under gender. The policy does not differentiate or exclude on these grounds, and inclusive terminology is used throughout.
<p>This will include people who are in the process of or in a care pathway changing from one gender to another Have you considered the possible needs of transgender staff and service users in the development of your policy or service?</p>				
Human Rights	✓			The policy upholds the principles of dignity, respect, and protection from discrimination, in line with the Equality Act 2010 and Human Rights Act 1998. There is no evidence of negative impact, and the policy's design and implementation are intended to actively promote and protect human rights for all staff.
<p>Affecting someone's right to Life, Dignity and Respect? Caring for other people or protecting them from danger? The detention of an individual inadvertently or placing someone in a humiliating situation or position?</p>				

If a negative or disproportionate impact has been identified in any of the key areas would this difference be illegal / unlawful? I.e. Would it be discriminatory under anti-discrimination legislation. (The Equality Act 2010, Human Rights Act 1998)

	Yes	No ✓		
What do you consider the level of negative impact to be?	High Impact	Medium Impact	Low Impact	No Impact
				✓

If the impact could be discriminatory in law, please contact the **Equality and Diversity Lead** immediately to determine the next course of action. If the negative impact is high a Full Equality Analysis will be required.

If you are unsure how to answer the above questions, or if you have assessed the impact as medium, please seek further guidance from the **Equality and Diversity Lead** before proceeding.

If the policy does not have a negative impact or the impact is considered low, reasonable or justifiable, then please complete the rest of the form below with any required redial actions, and forward to the **Equality and Diversity Lead**.

Action Planning:

How could you minimise or remove any negative impact identified even if this is of low significance?

- **Regular Equality Monitoring:** The policy requires ongoing monitoring of job evaluation outcomes by protected characteristics (age, disability, gender, race, etc.) to identify and address any disproportionate impacts. This enables early detection and mitigation of inequalities.
- **Consistency Checking:** All job evaluation outcomes are subject to regular internal and external consistency checks. This ensures fairness, robustness, and compliance with equal pay legislation, helping to prevent bias or discrimination.
- **Appeals and Grievance Procedures:** Staff who feel negatively impacted can access clear, transparent appeals and grievance processes. These are designed to resolve concerns informally where possible, and escalate to formal review if needed.
- **Inclusive Procedures:** The policy mandates reasonable adjustments for disabled staff, promotes flexible working, and uses inclusive terminology throughout. This helps remove barriers for those with protected characteristics.
- **Partnership Working:** Decisions are made jointly with staff representatives, ensuring transparency and reducing the risk of negative impacts from unilateral decisions.

- **Alignment with National Standards:** The Trust follows the NHS Job Evaluation Handbook, which is designed to be fair and non-discriminatory in both design and implementation. This includes gender-neutral factor plans and avoidance of indirect discrimination.

How will any impact or planned actions be monitored and reviewed?

- **Quarterly Reporting:** Job Evaluation Leads use trackers and data systems to monitor activity levels, outcomes (including equality impact), and timeliness of the process. Reports are submitted quarterly to the Transforming Culture and Staff Experience Sub Committee (TCSE).
- **Audit Trails:** All decisions, including job matching, evaluation, reviews, and appeals, are documented and auditable. This supports transparency and enables retrospective review if concerns arise.
- **Consistency Checking:** Outcomes are checked for consistency both internally (against other local evaluations) and externally (against national benchmarks), with any anomalies referred back for review.

How will you promote equal opportunity and advance equality by sharing good practice to have a positive impact other people as a result of their personal protected characteristic.

To promote equal opportunity and advance equality, the Trust takes a proactive and multi-layered approach that is embedded throughout its job evaluation processes. Good practice is shared and reinforced at every stage, ensuring that staff from all backgrounds and with any protected characteristic benefit from a fair, transparent, and inclusive system.

Firstly, the Trust ensures that all staff involved in job evaluation receive regular training in equality, diversity, and the avoidance of bias. This includes mandatory refresher training every three years, which helps to maintain high standards and awareness of best practice. By encouraging participation in the NHS Job Evaluation Community of Practice and providing access to national resources and guidance, the Trust supports continuous learning and the dissemination of good practice across the organisation.

Monitoring and reporting are central to advancing equality. The Trust regularly reviews job evaluation outcomes by protected characteristic, such as age, disability, gender, race, and others. Any findings or actions are published on the Trust's website, promoting transparency and accountability. This openness not only helps to identify and address any disparities but also fosters positive attitudes and trust within the workforce.

Consultation and involvement are also prioritised. The policy was developed in partnership with staff and their representatives, and ongoing engagement is encouraged to ensure that procedures remain relevant and effective. By embedding these practices, the Trust creates an environment where equal opportunity is actively promoted, and the positive impact of fair job evaluation is shared widely, benefiting staff and service users alike.

Please save and keep one copy and then send a copy with a copy of the policy to the Senior Equality and Diversity Lead at bsmhft.edi.queries@nhs.net. The results will then be published on the Trust's website. Please ensure that any resulting actions are incorporated into Divisional or Service planning and monitored on a regular basis