

A CONSISTENCY CHECKING CHECKLIST – FOR MATCHING

The matching procedure was designed to maximise consistency of application of the Agenda for Change pay system across trusts and organisations. However, even with the best possible training and most dedicated matching panels, some errors will occur, through, for example, tiredness or time pressures. Consistency checking of outcomes is, therefore, essential.

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, but is likely to increase the number of requests for review 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, as on CAJE, but checkers will also need access to the original data in case of queries. The most useful CAJE reports for the purpose are:

- Cross check report
- Data analysis report

Consistency checking should be carried out by trusts and organisations, alongside the actual matching activity. The possible roles of SHAs in consistency checking are to:

- Encourage trusts and organisations in their areas to carry out rigorous consistency checking
- Provide technical advice and support on consistency checking methods
- Deal with any queries arising from consistency checking, which cannot be dealt with at organisational level, for example, those requiring checks across other organisations or with other SHAs; or those concerning genuine matching problems

Consistency checking should be distinguished from monitoring in this context, which is a separate, although overlapping, but higher level process of reviewing the pattern of outcomes within and across trusts and organisations in the area. The purpose of monitoring is wider than that of consistency checking and includes, for example, the implications of the outcomes for costs. Although organisations will want to carry out some monitoring for themselves, the prime responsibility lies with SHAs – and separate CAJE training has been provided for this.

This Checklist deals with the actual process of consistency checking. Advice on procedures is given in the Job Evaluation Handbook, second edition, October 2004, section 11, p. 66-68. The Checklist supplements but does not replace that advice.

| FOR EACH GROUP OF JOBS: | YES/NO |
|---|---------------|
| Have you undertaken a consistency checking exercise (in line with the guidance in the Job Evaluation Handbook, p. 66-68)? | |
| 1. ACROSS THE GROUP OF JOBS: Have you checked that: | |
| 1.1 The matching forms have been correctly completed (including reference numbers, panel member codes, job statements and evidence against all factors)? | |
| 1.2 The jobs have been matched against profiles from the same occupational grouping*? | |
| 1.3 There is consistency across matching panels dealing with similar jobs within same occupational grouping and job family*? | |
| 1.4 For jobs in the group which were previously in the same grade or at the same level of work, they have matched to profiles in the same pay band OR there is a clear reason why this is not the case? | |
| 2. FOR EACH MATCHED JOB IN THE GROUP: have you checked that: | |
| 2.1 The profile used is appropriate to this job? | |
| 2.2 Any variations are legitimate in the light of the job information? | |
| 2.3 Where a reviewed profile has subsequently been published, the outcome has not substantially changed? | |
| 3. FOR EACH NON-MATCHED JOB IN THE GROUP: Have you checked (<u>before</u> sending out a JAQ to be completed for local evaluation) that: | |
| 3.1 This is really a non-match (i.e. the panel have not made an error)? | |
| 3.2 Where a new or reviewed profile has subsequently been published, this does not affect the matching outcome? | |
| 3.3 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? | |
| 4. FOR EACH QUERY FROM THE ABOVE INITIAL CHECK: Have you considered: | |
| 4.1 Sending it back to the same matching panel with queries identified (e.g. over evidence, profile used)? | |
| 4.2 Sending it to another matching panel for a comparative view? | |
| 4.3 Comparing profile used and/or outcome with neighbouring or other trusts with similar roles? | |
| 4.4 Referring it to the SHA JE Lead (or equivalent), for major issues? | |
| 5. FINAL CHECK: When all the above are resolved, are you satisfied that: | |
| 5.1 Jobs in the occupational grouping 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? | |
| 5.2 The distribution of the group of jobs across relevant pay bands seems reasonable for the type of trust or organisation? | |

- *Job family and occupational grouping* as defined in the Matching Procedure – see *Job Evaluation Handbook*, second edition p. 59.