

Cover Sheet

Trust Board Meeting in Public: Wednesday 12 March 2025

TB2025.28

Title: **Trust Management Executive Report**

Status: **For Information**

History: **Regular Reporting**

Board Lead: **Chief Executive Officer**

Author: **Joan Adegoke, Corporate Governance Officer**

Confidential: **No**

Key Purpose: **Assurance**

Trust Management Executive Report

1. Purpose

- 1.1. The Trust Management Executive [TME] has been constituted by the Trust Board and is the executive decision-making committee of the Trust. As such, it provides a regular report to the Board on some of the main issues raised and discussed at its meetings.
- 1.2. Under its terms of reference, TME is responsible for providing the Board with assurance concerning all aspects of setting and delivering the strategic direction for the Trust, including associated clinical strategies; and to assure the Board that, where there are risks and issues that may jeopardise the Trust's ability to deliver its objectives, these are being managed in a controlled way through the Trust Management Executive Committee. This regular report provided aims to contribute to the fulfilment of that purpose.

2. Background

- 2.1. Since the preparation of its last report to the Trust Board, the Trust Management Executive has met on the following dates:
 - 16 January 2025
 - 30 January 2025
 - 13 February 2025
 - 27 February 2025

3. Key Decisions and Updates

NHS England's 2025/26 priorities and operational planning guidance

- 3.1. TME received an update on NHS planning guidance for the year ahead which set out national priorities for patient outcomes in 2025/26 and productivity and budgeting expectations.

2024/25 Position

- 3.2. TME discussed and approved additional financial controls to improve the position before the end of 2024/25 financial year on 31 March and to put the Trust in the best possible position for 2025/26.

Interim Planning Submission 2025/26

- 3.3. TME received an update on planning for the next financial year.
- 3.4. OUH's interim planning document, outlining the Trust's position against core standards (elective care, cancer, diagnostics, urgent and emergency care,

finances, and workforce), was submitted to BOB ICB on 20 February. The final, updated version of the Trust's planning document is due by 19 March.

4. Other Activity Undertaken by TME

2025/26 Quality Priorities

- 4.1. Following presentation of the proposed Quality Priorities to the Council of Governors, TME reviewed and commented on the draft document before its presentation to the Trust Board.

Information Governance and Data Security core skills training

- 4.2. TME received an update on completion rate of core skills training by staff. This training is essential for all staff and the Trust is currently not meeting the national requirement for at least 95% of staff in all NHS organizations to complete Information Governance and Data Security core skills training.

Capital Schemes Update

- 4.3. TME was briefed on the update on key capital projects aimed at improving patient care and staff experience.
- 4.4. **Women's Centre** – works on Lift M3 were completed in January and works on Lift M4 are now underway, with completion scheduled for May – and the installation of an Anaesthetic Gas Scavenging System (AGSS) which is also scheduled to be completed in late May.
- 4.5. **Surgical Elective Centre on the JR site** – the project is progressing well. A proposal to provide extra space in the basement of the building was approved by TME. The first three floors will be installed on site over six weeks from June using offsite modular construction methods.

Internal Audit Reports

- 4.6. TME reviewed the following internal audit reports:
- Month-end Closedown Process;
 - Bullying and Harassment;
 - Equality, Equity, Diversity and Inclusion (EEDI) Maturity (unrated Maturity Assessment);
 - SDE Cyber Security; and
 - Compliant Direct Awards.
- 4.7. All reports received a rating of moderate assurance in relation to the effectiveness of controls.

Neonatal and Paediatric Critical Care Blue Light Enabled Transport Services

- 4.8. TME approved changes to the contract for the Southampton Oxford Retrieval Team (SORT) and Southampton Oxford Neonatal Transfer service (SoNeT).

Nursing and Midwifery Establishment Reviews

- 4.9. TME reviewed the findings from the 2024 summer establishment review and the recommendation to undertake further work in some areas.

Recruitment Trends for Consultant Positions- Analysis of Gender and Ethnicity in Recent Appointments

- 4.10. TME reviewed the comprehensive analysis of recruitment trends for consultant positions within the Trust, with a particular focus on gender and ethnicity dynamics.

5. Policy

- 5.1. TME reviewed the Pay on Appointment and Pay Progression Policy and recommended it for approval by the Trust Board.
- 5.2. TME approved the Reasonable Adjustments Policy which would be published once development of the ServiceNow auxiliary aid tracking and approval form had been concluded.

6. Reporting from sub-Committees

- 6.1. As part of its review of the People and Communications Committee reports, TME noted the activities undertaken by the Committee including approval of several policies and procedures and amendments to various other procedures.
- 6.2. TME reviewed the Clinical Governance Committee Report, which included summary quality reporting.
- 6.3. TME received the Estates & Facilities Premises Assurance Model (PAM) Report which detailed improvement in catering, cleaning and linens since the last assessment, and would be monitored by Estates Compliance Committee.
- 6.4. TME reviewed and approved changes to the Digital Oversight Committee's Terms of Reference (ToR).

7. Regular Reporting

- 7.1. In addition, TME reviewed the following regular reports:
- Integrated Performance Report (this is received by TME prior to presentation to the Trust Board and Integrated Assurance Committee);
 - Capital Schemes: TME continues to receive updates on a range of capital schemes across the Trust;

- Finance Report: TME continues to monitor financial performance;
- People Performance Report: TME receives and discusses monthly updates of the key KPIs regarding HR metrics;
- Briefing notes on Research & Development at OUH;
- Getting It Right First Time (GIRFT) Programme Update;
- Divisional Performance Reviews;
- Corporate Performance Reviews;
- Business Planning Pipeline Report;
- Procurement Pipeline Report; and
- Summary Impact of TME Business (which allows TME members to more easily track the combined financial impact of decisions taken.)

7.2. The following annual reports were reviewed by TME before their presentation to the Trust Board:

- PSIRF Annual Report;
- Medical Education Annual Report; and
- Responsible Officer's Annual Medical Appraisal and Revalidation Report

8. Key Risks

- 8.1. **Risks associated with the financial performance:** TME continued to recognise the risks and opportunities to deliver at pace the changes required to recover the financial position. **(BAF Strategic Risk 3.1 & 3.2)**
- 8.2. **Risks associated with workforce:** TME maintained continued oversight on ensuring provision of staff to ensure that services were provided safely and efficiently across the Trust and to maintain staff wellbeing in the light of substantial operational pressures. **(BAF Strategic Risk 1)**
- 8.3. **Risks to operational performance:** TME continued to monitor the risks to operational performance and the delivery of key performance indicators and the mitigations that were being put in place. **(BAF Strategic Risk 2)**

9. Recommendations

- 9.1. The Trust Board is asked to
- **note** the regular report to the Board from TME's meetings held on 16 January 2025, 30 January 2025, 13 February 2025, and 27 February 2025;
 - **approve** the Pay on Appointment and Pay Progression Policy (Appendix).

Pay on Appointment and Pay Progression Policy

A [toolkit](#) to support this Policy is available

Category:	Policy
Summary:	This policy implements the NHS Terms and Conditions of Service with regard to pay on appointment and pay progression for staff (excluding medical and dental staff) and provides guidance on the process to be followed for agreeing a higher starting salary for non-medical staff on appointment to the Trust.
Equality Impact Assessment undertaken:	October 2024
Valid From:	
Date of Next Review:	3 years Until such time as the review is completed and the successor document approved by the relevant committee this policy will remain valid.
Approval Via/Date:	
Distribution:	Via Human Resources Department Human Resources intranet
Related Documents:	Apprenticeship Procedure Conduct and Expected Behaviours Procedure Core Skills Policy Job Evaluation Procedure New and Expectant Parent Leave Procedure NHS Terms and Conditions of Service Sickness Absence Management Procedure Supporting Employee Performance Procedure Values Based Appraisal Policy
Author(s):	HR Manager – Policies and Procedures
Further Information:	NHS Terms and Conditions of Service
This Document replaces:	Pay on Appointment and Pay Progression Policy v6.0

Lead Director: Chief People Officer

Issue Date:

Contents

Introduction	3
Policy Statement.....	3
Scope	3
Aim	3
Definitions	3
Responsibilities	4
Pay Structure	6
Pay on Appointment.....	6
Employees with no previous NHS service.....	6
Existing NHS employees moving to a new post on the same pay band	7
Existing NHS employee moving to a new post on a lower pay band.....	8
Employees returning to the NHS (break in service less than 12 months)	8
Employees returning to the NHS (break in service greater than 12 months)	9
Process for agreeing a higher starting salary.....	9
Pay Progression.....	10
Pay progression standards	10
Pay step submission process	10
Decision to delay a pay step	11
Absence from work when pay step is due	12
Appeals Process	12
Training	13
Monitoring Compliance	13
Review.....	14
References.....	14
Equality Impact Assessment.....	14
Document History	14
Appendix 1 - Equality Impact Assessment.....	16

Introduction

1. This policy covers the pay on appointment and pay progression for all staff within the remit of the NHS Pay Review Body who are staff employed under the NHS Terms and Conditions of Service (commonly referred to as Agenda for Change).
2. Pay points (previously defined as increments) are expressed in terms of years of experience (measured in years from anniversary of appointment in that pay band) required to attain a level of pay.

Policy Statement

3. It is the policy of the Trust that a fair and transparent process is followed to determine pay on appointment for:
 - 3.1. staff moving from an Agenda for Change banded post, either within the Trust or the wider NHS, to another Agenda for Change banded post within the Trust (whether this is on the same pay band, a higher pay band or a lower pay band);
 - 3.2. staff joining the Trust with no previous NHS experience; and
 - 3.3. staff returning to the NHS after a break in NHS employment.
4. It is the policy of the Trust that pay progression for all points, within each pay band, is conditional upon staff demonstrating that they have the requisite knowledge and skills/competencies for their role and that they have demonstrated the required level of performance and delivery during the review period.

Scope

5. This policy applies to all employees of the Trust (excluding direct entry apprentices; see paragraph below) that are employed under the NHS Terms and Conditions of Service; this includes Retention of Employment (RoE) staff. It does not apply to medical and dental staff, very senior managers, honorary and observer contract holders, contractors, workers hired on a self-employed basis, or temporary staff engaged via the Bank.
6. Direct entry apprentices will be paid a set basic salary as determined by the Trust, see the Apprenticeship Procedure and [Apprenticeship Procedure Toolkit](#) for further information. For further guidance regarding apprenticeship salaries, including for existing NHS staff undertaking an apprenticeship, please refer to Annex 30 of the [NHS Terms and Conditions of Service Handbook](#) and contact the Apprenticeship Team.

Aim

7. The purpose of this policy is to ensure all decisions regarding pay on appointment and pay progression are made consistently, fairly and transparently and that all employees are aware of and understand the criteria that will be taken into account when determining pay on appointment and pay progression.

Definitions

8. The terms in use in this document are defined as follows:
 - 8.1. **Agenda for Change (AfC)** is the name often used to refer to the NHS Terms and Conditions of Service. A copy of the current [NHS Terms and Conditions of Service Handbook](#) is available from NHS Employers.
 - 8.2. **NHS employment**, including the wider NHS, refers to NHS employers set out in Annex 1 of the [NHS Terms and Conditions of Service Handbook](#). Please note that this does not include NHS Professionals.
 - 8.2.1. When employees who have been transferred out of NHS employment to a non-NHS provider return to NHS employment, their continuous service with

the non-NHS employer providing NHS funded services will be counted as service towards incremental credit.

- 8.3. The **pay band** describes the minimum length of service required on a pay step point before a member of staff is eligible to move to the next pay step. The pay band for a job is determined through the NHS Job Evaluation Process. Further information about pay bands is available in Annex 2 of the [NHS Terms and Conditions of Service Handbook](#) or from the relevant divisional HR team.
- 8.4. The **pay step date** is the anniversary of the date the member of staff commenced employment in their current band.
- 8.5. A **pay step point** is a pay value within a pay band expressed in terms of years of experience (measured in years from the anniversary of appointment in that pay band) required to attain a level of pay. Pay bands may have either a two point structure (indicating there is an entry point and a top point) or three point structure (indicating there is an entry, mid and top point), and progression to the next pay step point is dependent on a member of staff achieving the required years of experience and meeting specific criteria (refer to Pay Progression Standards below in paragraphs 48 to 52).
- 8.6. **Pay step submission process** is the process that must be followed for an employee to progress to the next pay step and will only take place after two, three or five years depending on the pay band. Appraisals will continue to take place annually.
- 8.7. **Years of experience** (as opposed to the previously used pay point numbers) are the number of years of experience required to attain a certain pay step point within a pay band.
- 8.8. **Recruitment and Retention Premium (RRP)** - is a supplementary payment in addition to the pay received for pay band position and any payments received for unsocial hours or on-call cover. It is payable to an individual post or specific group of posts where market pressures would otherwise prevent the Trust from being able to recruit staff to and/or retain staff in sufficient numbers for the post(s) concerned. RRP applies to posts and not to individuals; where an employee moves to a different post that does not attract RRP, either within the Trust or elsewhere in the NHS, their entitlement to any previous RRP will cease. Please refer to the Standard Operating Procedure for Recruitment and Retention Premium for further information about the process to be followed.

Responsibilities

9. The **Chief People Officer** (or their nominated deputy) is responsible for approving all exceptions to pay outside of nationally agreed terms and conditions.
10. **All Managers** are responsible for ensuring:
 - 10.1. salaries agreed on appointment or change of pay band are in line with the NHS Terms and Conditions of Service and this Policy;
 - 10.2. no offer of pay outside the NHS Terms and Conditions of Service or this Policy must be made until agreement is secured to deviate from these. This includes any request to pay a higher starting salary;
 - 10.3. where required, they complete and submit the 'Higher Starting Salary Request' form as soon as possible following the selection decision being made. Where a Higher Starting Salary Request is only agreed after the contract of employment has been issued to the new member of staff, the manager must complete and submit a Change Form, including a copy of the approved Higher Starting Salary Request, to update the employee's salary.

- 10.4. appraisals for their team members are carried out at least annually and a suitable record is kept;
 - 10.5. where members of their team have a different appraiser (please refer to the Trust's [Values Based Appraisal Policy](#) for further information) that the appraiser undertakes the appraisal at least annually and that a suitable record has been kept; and
 - 10.6. pay step review meetings are held in advance of the pay affecting grade step being due and that the Pay Step Review Meeting Outcome form is completed to record the outcome of the pay step review meeting and forwarded to the HR Records Team by the required deadline.
11. The **HR Records Team** are responsible for:
- 11.1. processing all payroll related paperwork in accordance with the authorisation requirements set out in this policy and the Trust's Standing Financial Instructions;
 - 11.2. processing all completed Pay Step Review Meeting Outcome forms and ensuring the completed form is uploaded to the employee's electronic personal record, returning the form to the manager if it is not fully completed or has been incorrectly completed;
 - 11.3. ensuring any 'Employee Change' forms submitted following a formal re-banding process comply with this policy and the Job Evaluation Procedure; and
 - 11.4. escalating any instances of non-compliance with this policy to the relevant Divisional Head of Workforce (cc'ing the Chief People Officer and Assistant Director of Workforce – Pay, Policy and Reward for their information).
12. The **Recruitment Team** are responsible for:
- 12.1. monitoring salaries on appointment to ensure the correct process has been followed and where appropriate, approval has been received to offer a higher starting salary before making any offer to a candidate;
 - 12.2. ensuring compliance with this Policy and the principles of the NHS Terms and Conditions of Service in relation to salaries agreed on promotion;
 - 12.3. ensuring where an offer of pay outside the NHS Terms and Conditions of Service or this Policy is made to a new starter, the correct approval has been received via the Higher Starting Salary process (see Process for agreeing a higher starting salary below);
 - 12.4. ensuring all payroll related paperwork submitted by the Recruitment Team to the HR Records Team complies with relevant Trust policies and procedures; and
 - 12.5. running the 'Inter Authority Transfer (IAT)' process on ESR for any member of staff joining the Trust from another NHS employer.
13. **Divisional Workforce Teams** are responsible for:
- 13.1. providing advice and guidance on determining pay on appointment and pay progression in accordance with this Policy;
 - 13.2. ensuring managers/department heads are aware of their responsibilities regarding pay on appointment and pay progression; and
 - 13.3. addressing instances of non-compliance with this Policy with the relevant manager.

Pay Structure

14. The pay band describes the minimum length of service on a pay step point required before a member of staff is eligible to progress to the next pay step point. It is considered that allowing a member of staff to progress more quickly through the pay band would undermine the principles of the pay system. Consequently, the Trust is unable to authorise progression to the next pay step point until the minimum length of service on a pay step point has been met.
15. Pay progression for all pay step points, within each pay band, will be conditional upon the employee demonstrating that they have the requisite knowledge and skills/competencies for their role and that they have demonstrated the required level of performance and delivery during the review period. Where a member of staff meets these criteria but there is a formal capability process in place or a live formal disciplinary sanction progression to the next pay step point will be effective the day after the sanction expires or the formal capability process has been successfully completed, subject to meeting the other pay progression criteria.

Pay on Appointment

Employees with no previous NHS service

16. It is expected that staff new to the NHS will ordinarily be appointed to the bottom of the relevant pay band, with their pay step date set as the date they commenced employment in their current band.
17. However, in exceptional circumstances, where there is sound evidence to support a business case, it may be possible to offer a salary above the bottom of the relevant pay band. Please refer to the 'Process for agreeing a higher starting salary' below.

Pay on promotion (new role at a higher pay band)

18. Basic pay on promotion will be set at the minimum pay-step point of the new pay band.
19. On promotion the new starting salary (made up of basic pay and any unsocial hours payments and/or long-term recruitment and retention premium (RRP) - short-term RRP is not included, refer to the Assistant Director of Workforce – Pay, Policy and Reward for guidance) should result in an increase in salary. If it does not, subject to paragraph 20, the manager must discuss with the relevant Divisional Head of Workforce how the previous salary will be maintained until the combination of basic pay, any unsocial hours payment and/or RRP in the new band does produce a higher salary. Any high cost area supplement received in the previous role will not be taken into consideration when calculating salary.
20. In the case of unsocial hours payments, the provisions in paragraph 19 will only apply if the unsocial hours working pattern in the new role remains substantially the same as the previous role. Where this is not the case, the previous unsocial hours payments will not be taken into consideration when determining the new starting salary.
21. The earnings calculations in paragraph 19 will be based on normal contractual hours excluding additional hours and will use unsocial hours payments averaged over the previous three months at work.
22. The pay step date will become the anniversary of the date they commenced in that new band. The exception to this is professional roles covered by Annex 20 of NHS Terms and Conditions of Service Handbook.
23. Where the member of staff has previous experience at a higher pay band within the last 12 months (for example, as a result of temporary movement into a higher pay band), their pay step point should be adjusted by the corresponding number of months to reflect their experience at the higher pay band.

24. Appointment to a different role on the same pay band is not promotion. Therefore, employees will remain on the same pay step point and retain their existing pay step date when appointed to a different role on the same pay band, regardless of whether the employee has moved internally within the Trust or been appointed from another NHS trust.

Temporary movement into a higher band

25. Where a member of staff moves to a job with a higher pay band on a temporary basis, for example to cover long term sick leave, maternity leave etc., pay will be set at the minimum pay step point of the temporary higher band. If this would result in no increase (by reference to the earnings from their substantive post) then pay will be determined as per the Pay on Promotion section above.
26. Where the member of staff has previous experience at the higher pay band within the last 12 months, their pay step point should be adjusted by the corresponding number of months to reflect their experience at the higher pay band.
27. Temporary movement into a new pay band should not normally last more than six months or less than one month, except in instances of maternity, adoption or shared parental leave, long-term sick leave or career breaks, where a longer period may be known at the outset.
28. On temporary movement into a higher pay band the pay step date will reset to the date the member of staff starts in the new pay band. Any time spent in the higher pay band will be credited towards the employee's substantive post's pay step date, for the purpose of progression, upon their return to their substantive post at the lower band. Working at a higher band does not warrant a member of staff receiving any additional incremental progression (i.e. automatic movement to the top of the band).
29. Where a member of staff is then permanently appointed to the higher banded role they have been undertaking on a temporary basis their pay step date will remain the date they started in the new pay band (i.e. the date they temporarily moved into the higher pay band).

Job re-banding

30. Where a post is re-banded to a higher band because of a formal job evaluation process the pay step point will become the minimum for the new pay band and the pay step date will become the anniversary of the agreed date that the new job description is deemed to have taken effect (refer to the Job Evaluation Procedure for further information).

Existing NHS employees moving to a new post on the same pay band

31. Where an existing NHS employee moves to a new post on the same pay band they will retain their current pay step point and pay step date. Any high cost area supplement received in the previous role will not be taken into consideration when calculating salary.
32. To ensure a new employee is placed on the correct pay step point and pay step date evidence of the previous pay step point and date will be required. Where possible this information will be obtained electronically by the Human Resources Department via the 'Inter Authority Transfer' process available on the Electronic Staff Record (ESR) system; however, where this is not possible the member of staff will be asked to provide a copy of a recent payslip (dated within the last three months) from their previous NHS employer. If the new employee is unable to provide a payslip dated within the last three months, they should discuss this with the Assistant Director of Workforce – Pay, Policy and Reward.

33. Initially staff will be paid on the minimum of the band until confirmation of the previous pay step point and date has been received by the Trust. This process should be concluded within three months of the new employee commencing in post.

Existing NHS employee moving to a new post on a lower pay band

34. Where an existing NHS employee is appointed to a post in a lower pay band their pay step point will be calculated as follows:
- 34.1. Where the member of staff has not recently worked at the lower pay band, the member of staff will usually enter the pay band at the point they would have reached if all their NHS service in higher pay band(s) had been worked in the lower band.
 - 34.2. Where the member of staff has previous recent experience in the lower pay band role, they will enter the pay band at the point they would have reached if all their complete years of NHS service in both the lower banded and higher banded role had been combined. For example, if a member of staff was promoted from a band 5 post where they had three years' experience to a band 6 role where they gained one year's experience and then moved back to a band 5 role, they will move to the point that recognises four-five years of experience.
 - 34.3. The pay step date will become the date they commenced employment in the current band, except in cases where the employee has moved to a lower banded post as part of a formal organisational change process where the pay step date will remain unchanged.
 - 34.4. Any high cost area supplement received in the previous role will not be taken into consideration when calculating salary.
35. To ensure the employee is placed on the correct pay step point evidence of their NHS service in the higher pay band(s) must be provided by the employee to the Recruitment Team.

Employees returning to the NHS (break in service less than 12 months)

36. Where a member of staff returns to the NHS after a break in service of 12 months or less and they are returning to a role on the same pay band they will enter the pay band at the same pay step point that they were on when they left. Their pay step date will be adjusted to account for previous time served at that pay step point (for example if the employee had already worked for nine months prior to leaving the NHS, they would be due a further pay step three months after their return to NHS employment – please note this may not be a pay affecting pay step).
37. To ensure the member of staff is placed on the correct pay step point and date they will need to provide a copy of their last payslip to the Recruitment Team.
38. Where the member of staff is unable to provide a copy of their last payslip, they will be responsible for contacting their previous employer to request written confirmation of the pay step point and pay step date they were on at the time they left their employment.
39. Initially staff will be paid at the minimum of the pay band until confirmation of the previous pay step point and date has been received by the Trust.
40. Where a member of staff returns to the NHS after a break in service of 12 months or less to a lower banded role the provisions in the section entitled 'Existing NHS employee moving to a new post on a lower pay band' will apply.

Employees returning to the NHS (break in service greater than 12 months)

41. Where a member of staff returns to the NHS after a break in service of 12 months or more, they will ordinarily be appointed on the bottom of the relevant pay band and their pay step date will be the date they commenced employment in their current band.
42. However, in exceptional circumstances, where there is sound evidence to support a business case, it may be possible to offer a salary above the bottom of the relevant pay band. Please refer to the 'Process for agreeing a higher starting salary' below.

Process for agreeing a higher starting salary

43. No offer of a higher starting salary can be made to the candidate unless agreement to offer a higher starting salary is received from the Chief People Officer (or their nominated deputy) via the Pay Panel.
44. In order to make a request the appointing manager should complete and submit a 'Higher Starting Salary Request' form. The form must demonstrate that local support to offer a higher starting salary has been obtained from the relevant Divisional Director (or equivalent for corporate divisions) and Divisional Head of Workforce. Please refer to the policy [toolkit](#) for further information about the process that must be followed.
45. The completed 'Higher Starting Salary Request' form should be completed and submitted as soon as possible following the selection decision being made (see the Recruitment and Selection Procedure for further information about the selection decision) to ensure the request can be considered in advance of the contract of employment being issued to the new member of staff. Where the Higher Starting Salary Request is only agreed after the member of staff has commenced employment, the hiring manager must complete and submit a Change Form, including a copy of the approved Higher Starting Salary Request, to update the employee's salary.
46. When requesting approval to offer a salary above the bottom point of the relevant pay band the following should be considered and documented on the relevant form:
 - 46.1. whether the proposed salary is commensurate with the qualifications and breadth/depth of experience of the applicant i.e., they have all the relevant knowledge and experience to perform the role at the highest level;
 - 46.2. that, if offered, the salary would not cause problems of relativity with existing staff, (i.e., the new employee would not be in receipt of a higher salary than existing staff with the same level of experience, knowledge and skills);
 - 46.3. that, if offered, the salary would not be greater than the salary the member of staff would have been on if all their experience had been gained in the NHS; and
 - 46.4. the manager has taken into consideration the principles of the Equality Act 2010 and the Equal Pay Act 1970. For further guidance on the Equality Act and the Equal Pay Act please contact the relevant Divisional Head of Workforce.
 - 46.5. It is very important that higher starting pay is only used to recognise knowledge, skills and experience and is not used as a tool to overcome difficulties in the labour market. Where a recruitment process has produced no suitable applicants and it has been determined that the role is difficult to recruit to due to labour market conditions, consideration should be given to whether an application to award Recruitment and Retention Premium (RRP) should be made. The Standard Operating Procedure for Recruitment and Retention Premium (RRP) outlines the process to follow in these instances.
47. Where staff are recruited from overseas, the Recruitment Team will provide specific advice to managers to determine the most appropriate starting salary.

Pay Progression

Pay progression standards

48. A member of staff will progress to the next pay step on their pay step date where the following can be demonstrated:
 - 48.1. the appraisal process has been successfully completed within the last 12 months;
 - 48.2. there is no formal capability process in place;
 - 48.3. there is no formal disciplinary sanction live on the employee's record; and
 - 48.4. all core skills learning has been completed and is up to date.
 - 48.5. For line managers only – appraisals have been completed for all their staff as required.
49. For the purposes of determining if the pay progression standards have been met any formal warnings issued under the Sickness Absence Management Procedure should be excluded.
50. A formal capability process means that there has been an outcome placing the employee in a formal stage of the Trust's Supporting Employee Performance Procedure. A disciplinary sanction refers to a formal warning issued under the Trust's Conduct and Expected Behaviours Procedure. Investigations, informal stages, records of discussion, informal performance improvement plans and processes for dealing with absence due to ill health will be excluded.
51. If a disciplinary sanction or formal capability process is in place at the time of the pay step date but is subsequently repealed, the pay step will be backdated to the pay step date if all other standards have been met.
52. Where factors beyond the member of staff's control, such as organisational or operational issues, have prevented compliance with any of the pay progression standards detailed in paragraph 48 these should not prevent the employee from progressing. Managers should ensure that they take full account of such factors and staff should bring these to the attention of their line manager as soon as possible (not waiting until the pay step review) so that these can be addressed and remedied.

Pay step submission process

53. Managers will receive regular reports detailing the pay affecting grade step dates for staff within their teams.
54. The pay step submission process is as follows:
 - 54.1. Line managers must initiate a meeting with the employee before their next pay affecting pay step date to review whether the requirements for progression have been met (no meeting is required if the next pay step date is not pay affecting).
 - 54.2. This meeting will draw on the most recent appraisal outcome and consider the standards detailed in paragraph 48. It is not necessary to schedule appraisals to coincide with pay step dates.
 - 54.3. At the review meeting the Pay Step Review Meeting Outcome form (available from the [HR E-Forms](#) intranet site) must be completed.
 - 54.4. There are two possible outcomes from the review meeting: (1) the standards have been met; or (2) the standards have not been met.
55. If the standards detailed in paragraph 48 have been met the member of staff will progress to their next pay step on their pay step date. To enable the Payroll Department

to action this move the completed Pay Step Review Meeting Outcome form must be submitted in the month preceding the member of staff's pay step date.

55.1. Any completed Pay Step Review Meeting Outcome forms submitted more than two months before the pay affecting pay step date will be returned to the manager (with the exception of staff who have their pay step review meeting early in line with paragraph 68 below) and will need to be re-submitted at the correct time.

- 56. There may be occasions where the standards have not been met, but there are significant mitigating factors. In these circumstances the manager must consider whether the mitigating factors justify delaying a pay step or not. Advice should be sought from the appropriate Divisional Head of Workforce as necessary.
- 57. If the standards detailed in paragraph 48 have not been met and there are no mitigating factors, please refer to the 'Decision to delay a pay step' section for further information on the process to follow.
- 58. Although staff must have successfully completed their appraisal within the last 12 months to move to their next pay step point, the date the appraisal takes place does not need to be linked to their pay step date.

Decision to delay a pay step

- 59. It is expected that staff will achieve the required standards at the point of their pay step date. It is also expected that staff and their line manager should have regular discussions about any problems in reaching the required standards before the pay step date to allow for possible solutions to be found to enable pay step progression.
- 60. In situations where the standards have not been met as per paragraph 48, and there are no mitigating factors sufficient to justify this, it is expected that an individual's pay step will be delayed, subject to the arrangements outlined in this section.
- 61. At the pay step review meeting the manager should discuss the standards that have not been met and review previous discussions about these, consider any mitigating factors, record their decision on the Pay Step Review Meeting Outcome form and submit the completed Form to the HR Records Team to record on the member of staff's electronic personal file.
- 62. Where the manager has made the decision to delay the pay step, the member of staff has the right to appeal this decision, please refer to the Appeals Process section for further information. If the appeal is upheld, the pay step should be applied backdated to the pay step date.
- 63. Where a pay step has been delayed the manager should discuss and agree a plan with the member of staff for any remedial action needed to ensure the required standard for pay progression is met, including a timescale and how any training and support needs will be met. Please refer to the [Toolkit](#) for the Deferred Pay Step Development Plan. Where a pay step has been delayed due to the member of staff having a live formal warning this should be reflected in the plan.
- 64. The member of staff must take all necessary steps to meet the requirements as soon as possible and the manager must provide the necessary support.
- 65. A further pay step review meeting should be arranged at an agreed date to review progress and, where satisfactory, initiate progression to the next pay step by forwarding a copy of the completed Deferred Pay Step Development Plan to the HR Records Team. The effective date for progressing to the next pay step should be the earliest date that the relevant requirements are shown to have been met, for example when the development plan has been achieved or when a formal warning has expired. The pay step date for future years will remain unchanged.

66. There is no entitlement to backpay between the original pay step date and the date the relevant requirements are shown to have been met, for example if the original pay step date was 30 June but the pay step was delayed due to outstanding core skills learning which was completed by 27 July, the employee will progress to the next pay step from 27 July and their pay step date for future years will remain 30 June.
67. Where a pay step is delayed due to a live disciplinary sanction, or a formal capability process, the line manager should initiate a pay step review meeting immediately before the expiry of the sanction or formal capability plan. This should be used to confirm that all other requirements have been met and to ensure that the staff member progresses to the next pay step, effective the day after the sanction expires. Future pay step dates will remain unchanged.
68. A disciplinary sanction cannot be applied retrospectively to delay a pay step if it comes into effect after the pay step date.

Absence from work when pay step is due

69. If a member of staff is absent from work for reasons such as long-term sickness or maternity, adoption or shared parental leave when a pay step is due, the principle of equal and fair treatment should be followed so that no detriment is suffered as a result.
70. In the case of planned long-term paid absence such as maternity, adoption or shared parental leave the pay step review can be conducted early if this is reasonable and practical, allowing the pay step to be applied on the member of staff's pay step date in their absence. In these circumstances the manager should follow the steps set out in the 'Pay step submission process' above.
71. If a member of staff is on long-term paid absence such as maternity, adoption or shared parental leave and a pay step review cannot be conducted prior to the pay step date; the pay step point should normally be applied in their absence, in line with the principles of equal and fair treatment (please refer to paragraphs 70 and 71 for exclusions to this). Where the pay step is to be applied in the member of staff's absence the manager must complete and submit the Pay Step Review Meeting Outcome form in the month preceding the member of staff's pay step date.
72. If there was a live disciplinary sanction in place at the point the member of staff went on leave, the pay step point should be applied in their absence if appropriate, effective the day after the sanction expires.
73. If there was an active formal capability process underway at the point the member of staff went on leave, the pay step point will be delayed. The improvement process should be resumed immediately upon their return. On satisfactory completion, the period of their absence should be set aside and the pay step point backdated to an agreed date as if they had completed the improvement process without being absent. Managers must take care to avoid any discrimination or detriment on the grounds of maternity, sex or disability that could arise in relation to staff on maternity/adoption/shared parental leave or sick leave.
74. If a member of staff is suspended from work the Trust will ensure that the pay step is applied from the pay step review date if a member of staff is suspended on that date, provided they were meeting the standards in paragraph 48 at the time of suspension.

Appeals Process

75. A member of staff has the right of appeal against a decision to delay their pay step. In all cases, the member of staff must address their appeal to the Director of Workforce within seven calendar days of being notified that their pay step has been delayed. When submitting their appeal, the member of staff should state the full grounds for their appeal.

76. An appeal hearing will normally be arranged within 14 calendar days of receipt of the appeal documentation. Where practicable, the appeal hearing will be conducted by a manager more senior than the one who made the decision to delay the pay step and who has not been previously involved in the case.
77. The chair of the appeal hearing may ask anyone previously involved to be present. The member of staff has the right to be accompanied by trade union representative or colleague to the appeal hearing.
78. The Trust will confirm the final decision in writing, normally within seven calendar days of the appeal hearing.
79. The purpose of an appeal is to consider whether the decision made to delay the pay step was fair and reasonable at the time, and whether the correct procedure was applied. The appeal must take account of any information that has emerged since the initial decision to delay the pay step.
80. The decision of the appeal at any stage is final, and there is no further right to appeal.

Training

81. There is no mandatory training associated with this guidance. Ad hoc training sessions based on an individual's training needs will be defined within their annual appraisal or job plan.

Monitoring Compliance

82. Data on pay step and re-earnable pay outcomes must be collected, audited, published and monitored locally in partnership with staff side, including by protected characteristics and contract status.
83. The Trust must also collect and submit the data necessary to support national monitoring of the pay progression system by and on behalf of the Staff Council.

Aspect of compliance or effectiveness being monitored	Monitoring method	Responsibility for monitoring (job title)	Frequency of monitoring	Group or Committee that will review the findings and monitor completion of any resulting action plan
Pay step (including deferral) by protected characteristics and contract status	Audit of pay progression data from ESR	Assistant Director of Workforce – Pay, Policy & Reward	Ad-hoc as required	People and Comms Committee, Trust Alliance Committee and Equality, Diversity and Inclusion Steering Group
Number of Higher starting Salary Requests submitted, agreed and declined by protected characteristics and contract status	Audit higher starting salary requests received via the Clinical/Non-Clinical Pay Panel	Assistant Director of Workforce - Resourcing	Ad-hoc as required	People and Comms Committee and Equality, Diversity and Inclusion Steering Group
Number of pay steps authorised when Trust standards have not been met but mitigating	Audit of completed Pay Step Review Meeting Outcome forms	Assistant Director of Workforce – Pay, Policy & Reward	Ad-hoc as required	People and Comms Committee, Trust Alliance Committee and Equality, Diversity and

Aspect of compliance or effectiveness being monitored	Monitoring method	Responsibility for monitoring (job title)	Frequency of monitoring	Group or Committee that will review the findings and monitor completion of any resulting action plan
factors were taken into consideration				Inclusion Steering Group
Number of appeals against decision to delay pay step	Audit of Trust's Employee Relations Tracker	Assistant Director of Workforce – Employee Relations	Ad-hoc as required	People and Comms Committee and Equality, Diversity and Inclusion Steering Group

84. The Trust may undertake monitoring of this guidance as response to identification of any gaps or as a result of the identification of risks arising from the guidelines prompted by incident review, external reviews, or other sources of information and advice. This monitoring could include:

- 84.1. commissioned audits and reviews;
- 84.2. detailed data analysis; and/or
- 84.3. other focused studies.

Review

85. This policy will be reviewed in three years, as set out in the Developing and Managing Policies and Procedural Documents Policy. It may need revising before this date, particularly if national guidance or local arrangements change.
86. Until such time as the review is completed and the successor document approved by the relevant committee this policy will remain valid.

References

87. References in this document include:
- 87.1. [NHS Terms and Conditions of Service Handbook](#)
 - 87.2. [NHS Employers Pay Deal Questions and Answers](#)
 - 87.3. [NHS Employers Pay Progression Scenarios](#)
 - 87.4. [NHS Job Evaluation Handbook](#)

Equality Impact Assessment

88. As part of its development, this guidance and its impact on equality has been reviewed. The purpose of the assessment is to minimise and if possible, remove any disproportionate impact on the grounds of race, gender, disability, age, sexual orientation or religious belief. No detriment was identified. The assessment form can be found at **Appendix 1**.


Document History

Date of revision	Version number	Reason for review or update
August 2013	1.0	First version of guidelines

Date of revision	Version number	Reason for review or update
January 2014	2.0	Revisions made following feedback from Non-Medical CIP Task & Finish Group.
May 2014	3.0	Revisions made following changes to approval of exceptional salary requests
July 2014	4.0	Revision made to include guidance on the application of a spot salary.
February 2015	4.2	Revision made to remove reference to IDSPay.co.uk due to very low take up of this benchmarking
January 2017	4.3	Revision to tighten controls and add new junior doctor contract
January 2020	4.5	Updated to reflect changes to NHS Terms and Conditions of Service, removed reference to medical and dental staff, incorporated Linking Pay Progression and Performance Policy into this policy.
November 2021	4.9	Included process for pay progression and undertook full review of policy wording in line with terms and conditions of service.
January 2022	4.12	Updated following feedback received during consultation on the draft Policy.
March 2022	5.0	Policy approved by Trust Board
June 2022	6.0	Minor updates to the policy approved by People and Communications Committee 13 June 2022. Minor updates include the earliest a Pay Step Review Meeting Outcome form may be submitted, that no Outcome form needs to be submitted if the next pay step date isn't pay affecting, clarification that where a member of staff is absent the manager still needs to complete the Pay Review Meeting Outcome form and that where a pay step is delayed as the pay progression criteria have not been met there is no entitlement to backpay between the original pay step date and the date the relevant requirements are shown to have been met.
June 2023	7.0	Minor update to paragraph 52.3 (to signpost managers to the HR E-Forms site) approved by People and Communications Committee on 12 June 2023.
October 2024	7.1	Three year review of the policy.

Appendix 1 - Equality Impact Assessment

1. Information about the policy, service or function

What is being assessed	Existing Policy / Procedure
Job title of staff member completing assessment	HR Manager – Policies and Procedures
Name of policy / service / function:	Pay on Appointment and Pay Progression Policy
Details about the policy / service / function	This policy implements the NHS Terms and Conditions of Service with regard to pay on appointment and pay progression for all staff (excluding medical and dental staff) and provides guidance on the process to be followed for agreeing a higher starting salary for non-medical staff on appointment to the Trust.
Is this document compliant with the Web Content Accessibility Guidelines ?	Yes
Review Date	3 years
Date assessment completed	October 2024
Signature of staff member completing assessment	Anna Strange
Signature of staff member approving assessment	

2. Screening Stage

Who benefits from this policy, service or function? Who is the target audience?

- Staff

Does the policy, service or function involve direct engagement with the target audience?

Yes - continue with full equality impact assessment

3. Research Stage

Notes:

- If there is a neutral impact for a particular group or characteristic, mention this in the 'Reasoning' column and refer to evidence where applicable.
- Where there may be more than one impact for a characteristic (e.g. both positive and negative impact), identify this in the relevant columns and explain why in the 'Reasoning' column.
- The Characteristics include a wide range of groupings and the breakdown within characteristics is not exhaustive but is used to give an indication of groups that should be considered. Where applicable please detail in the 'Reasoning' column where specific groups within categories are affected, for example, under Race the impact may only be upon certain ethnic groups.

Impact Assessment

Characteristic	Positive Impact	Negative Impact	Neutral Impact	Not enough information	Reasoning
Sex			X		Agenda for change has been assessed as being equal pay compliant when implemented correctly. Pay step review outcomes will monitored by protected characteristic and the data shared with the relevant committee(s). A more robust process for agreeing higher starting salaries is in place and requires managers to take into consideration the principles of equal pay and the Equality Act when requesting a higher starting salary. All requests for a higher starting salary will require approval by the same Executive Officer and/or panel to ensure greater consistency of decision making.
Gender Re-assignment			X		Agenda for change has been assessed as being equal pay compliant when implemented correctly. Pay step review outcomes will monitored by protected characteristic and the data shared with the relevant committee(s). A more robust process for agreeing higher starting salaries is in place and requires managers to take into consideration the principles of equal pay and the Equality Act when requesting a higher starting salary. All requests for

Characteristic	Positive Impact	Negative Impact	Neutral Impact	Not enough information	Reasoning
					a higher starting salary will require approval by the same Executive Officer and/or panel to ensure greater consistency of decision making.
Race - Asian or Asian British; Black or Black British; Mixed Race; White British; White Other; and Other			X		<p>A new process for agreeing higher starting salaries for new recruits is in place. When submitting a request for approval to pay a higher starting salary the manager needs to demonstrate they have taken into consideration the principles of equal pay and the Equalities Act. All requests for a higher starting salary will require approval by the same Executive Officer and/or panel to ensure greater consistency of decision making.</p> <p>With regards to pay progression criteria not being met if the member of staff has a live disciplinary sanction under the Conduct and Expected Behaviours Procedure on their record or a formal capability process under the Supporting Employee Performance Procedure in place, both these procedures have been equality impact assessed separately and work has been undertaken to ensure equitable outcomes under these procedures.</p> <p>Pay step review outcomes are monitored by protected characteristic and the data shared with the relevant committee(s).</p>
Disability - disabled people and carers			X		The policy sets out the steps to be followed if the member of staff is absent from work on a long term basis when a pay step is due to ensure the member of staff suffers no detriment as a result of their absence. Any warnings under the Sickness Absence Management Procedure are not taken

Characteristic	Positive Impact	Negative Impact	Neutral Impact	Not enough information	Reasoning
					<p>into account when determining if the pay progression criteria set out in this Policy have been met.</p> <p>Pay step review outcomes will monitored by protected characteristic and the data shared with the relevant committee(s).</p>
Age		X	X		There is the potential for negative impact to younger applicants when taking into account other relevant knowledge, skills and experience in determining the pay on appointment for applicants with no previous NHS experience or a break in NHS service. However, this is justifiable as the same principles would apply to all applicants with no NHS experience, regardless of age.
Sexual Orientation			X		Pay step review outcomes are monitored by protected characteristic and the data shared with the relevant committee(s).
Religion or Belief			X		Pay step review outcomes are monitored by protected characteristic and the data shared with the relevant committee(s).
Pregnancy and Maternity			X		The policy sets out the steps to be followed if a member of staff is on maternity leave (or adoption or shared parental leave) at the time a pay step is due to ensure the member of staff suffers no detriment as a result of their absence.
Marriage or Civil Partnership			X		Pay step review outcomes are monitored by protected characteristic and the data shared with the relevant committee(s).

Characteristic	Positive Impact	Negative Impact	Neutral Impact	Not enough information	Reasoning
Other Groups / Characteristics - for example, homeless people, sex workers, rural isolation.					

DRAFT

Sources of information

- NHS Terms and Conditions of Service.
- NHS Employers Pay Deal FAQs document.

Consultation with protected groups

Group	Summary of consultation

Consultation with others

The updated draft policy will be circulated for a 30 day consultation period to Staff Side Representatives; Divisional Workforce Teams; Staff Network Chairs (including the BAME Network, Women's Network, Disability and Accessibility Network, and Apprentice Network) with a request to circulate the draft policy to their members; and Divisional and Corporate Management Teams. The draft policy will also be available in [the HR Policies and Procedures Out for Consultation](#) folder on the Trust intranet. During the consultation period any member of staff is able to submit feedback on the draft policy.

4. Summary stage

Outcome Measures

Through implementation of this policy it is anticipated the following will be achieved:

- Transparent pay on appointment and pay progression process,
- Process applied consistently across the Trust to all non-medical staff; and
- Pay on appointment and pay progression process is aligned with nationally agreed NHS Terms and Conditions of Service.

For staff who are absent at the time of their grade step point guidance is included on pay progression.

If at the time the grade step is due the employee does not meet the local criteria for pay progression as they do not have a current appraisal and/or up-to-date core skills employees are able to provide mitigation which may still allow for pay progression.

The policy also allows for the right of appeal against a decision to defer pay progression which will allow the decision to be reviewed by an independent third party.

Positive Impact

Through the requirement for all higher starting salaries to be approved by the same Executive Officer and/or panel it is expected there will be greater transparency, consistency of approach and reduce the potential for unconscious bias.

Pay progression will only occur when the member of staff has reached a pay step date and can demonstrate they are up to date with their core skills learning (previously referred to as statutory and mandatory training), have a current appraisal and have no formal warnings under the Conduct and Expected Behaviours Procedure or Supporting Employee Performance

Procedure. This will ensure there is greater consistency and fairness in how staff progress through the pay scale as there will be no opportunity to miss out grade step points.

Unjustifiable Adverse Effects

There is potential that unconscious bias may factor into a decision regarding salary on appointment when taking into account non-NHS experience; however the introduction of a consistent route for decision making will help to mitigate the potential inconsistency between multiple decision makers.

Justifiable Adverse Effects

There is the potential for leapfrogging of existing staff when agreeing a higher starting salary for a candidate new to the NHS, however any agreement to pay above the first pay step point must be supported by the candidate having demonstrable, relevant, transferable knowledge, skills and experience and any higher starting salary agreed cannot be greater than the salary the candidate would have been on if they had gained all their relevant experience in the NHS.

There is potential for an adverse impact on the basis of age, particularly, younger applicants when taking into account other relevant knowledge, skills and experience in determining the pay on appointment for applicants with no previous NHS experience or a break in NHS service. However, this is justifiable as the same principles would apply to all applicants with no NHS experience, regardless of age.

Equality Impact Assessment Action Plan

Complete this action plan template with actions identified during the Research and Summary Stages

Identified risk	Recommended actions	Lead	Resource implications	Review date	Completion date

HR Policy Communication Plan

HR policy title:	Pay on Appointment and Pay Progression Policy
Lead author:	Anna Strange, HR Manager – Policies and Procedures
Senior lead:	Adam Kirton, Assistant Director of Workforce – Pay, Policy and Reward

Aim

- To ensure all staff (including managers) are aware of changes that have been made to a policy following its review and consultation.

Key message(s) to be communicated

The Pay on Appointment and Pay Progression Policy has been reviewed to ensure it remains aligned with the NHS Terms and Conditions of Service Handbook and reflects current policies and processes. The following updates should be noted:

- Reference to apprentices have been updated to mirror the terminology in the Apprentice Procedure and highlight for further guidance regarding apprenticeship salaries, including for existing NHS staff undertaking an apprenticeship, Annex 30 of the NHS Terms and Conditions of Service Handbook should be referred to along with the Apprenticeship Team.
- Where a manager needs to submit a Higher Starting Salary Request, this must be completed and submitted as soon as possible following the selection decision being made.
- Where a Higher Starting Salary Request is only agreed after the member of staff has commenced employment, the hiring manager must complete and submit a Change Form, including a copy of the approved Higher Starting Salary Request, to update the employee's salary.
- The Appeals Process has been incorporated into the policy (as opposed to referring out to the Appeals Procedure).

Support required from the Media and Communications Team

Details of the updated policy will be communicated to all staff via the Staff Bulletin and Now@OUH.

Other communication options to consider (to be agreed with the Media and Communications Team and Assistant Director of Workforce – Pay, Policy and Reward)

- N/a

The dates set out below are based on the policy being approved at Trust Board currently scheduled for 12 March 2025. Should this change, the communication plan will be revised to reflect the new dates.

Date	Action	Method	Responsibility
w/c 31 March 225	Update the HR Policies and Procedures folder on the intranet with the new version of the policy	Upload to HR Policies and Procedures folder on intranet (removing previous version where necessary)	HR Manager – Policies and Procedures
w/c 31 March 25	Archive the superseded policy/procedure	Move master copy from 'Current Policies' folder to 'Superseded Policies and Procedures' folder	HR Manager – Policies and Procedures
w/c 31 March 25	Update toolkit (where necessary).	Upload new/updated documents to the relevant toolkit in the HR Document Library on the intranet and remove previous version(s)	HR Manager – Policies and Procedures
w/c 31 March 25	Include update regarding the policy in Now@OUH and the Staff Bulletin.	Draft the information, upload to Now@OUH and email a short summary to the Media and Communications Team (cc to HR Manager – Policies and Procedures) for inclusion in the Staff Bulletin.	Lead author
w/c 31 March 25	Advise the Divisional Heads of Workforce, Health Innovation Oxford and Thames Valley Head of Corporate Affairs and People and Staff Side Chair, Staff Side Secretary and LNC Chair via email (cc to HR Consultants, HR Advisors and Assistant Directors of Workforce) that the policy has been approved and any key changes that have been made to the policy.	Via email (including link to policy on the intranet)	HR Manager – Policies and Procedures
w/c 31 March 25	Advise the Trust PFI Team of the updated/new policy including any updates made to the Toolkit.	Via email to the PFI Data Assistant (including link to policy on the intranet)	HR Manager – Policies and Procedures

Date	Action	Method	Responsibility
w/c 07 April 25 onwards	Ensure HR Consultants and HR Advisors are clear of how the policy is being implemented within the division and wider organisation, including any local processes as appropriate.	Discussion with Divisional HR Team	Divisional Heads of Workforce
w/c 07 April 25 onwards	Advise managers within their division(s) that the policy has been approved (including link to policy on the intranet) and any key changes that have been made to the policy. Ensure managers are aware they are responsible for cascading the information to their teams.	NOTSSCaN – email to divisional managers Corporate – email to divisional managers MRC – present slide deck at divisional meetings. SuWOn – cascade via HR Consultants at divisional meetings. CSS – present slide deck at divisional meetings.	Divisional Heads of Workforce and Health Innovation Oxford and Thames Valley Head of Corporate Affairs and People
w/c 07 April 25 onwards	Ensure the divisional management team are aware of the updated policy (including any key changes made) and any responsibilities they have under the policy.	Discuss policy at divisional management team meeting.	Divisional Heads of Workforce and Health Innovation Oxford and Thames Valley Head of Corporate Affairs and People
w/c 07 April 25 onwards	Cascade information about the new policy throughout division and ensure managers are aware they are responsible for cascading the information to their teams.	NOTSSCaN – arrange Q&A session with directorates Corporate – discussion at regular team meetings and during directorate performance meetings. MRC – circulation of Directorate Workforce report and discussion at divisional meetings. SuWOn – discussion at divisional meetings.	HR Consultants

Date	Action	Method	Responsibility
		CSS – discussion at divisional meetings.	
w/c 14 April 25 onwards	Cascade information about the updated/new policy/procedure to staff within their team/department.	Via team meetings, one to ones and other department communication channels	Department managers, OSMs, Matrons, Service Unit Leads, Ward Managers etc.