**HR 25**

**Appendix 2**

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**AGENDA FOR CHANGE**

**A GUIDE TO PREPARING GENERIC JOB DESCRIPTIONS**

**CONTENTS**

1. INTRODUCTION

2. THE PURPOSE OF JOB DESCRIPTIONS

3. PROCESS FOR CREATION OF GENERIC JOB DESCRIPTIONS

4. EVALUATION OF GENERIC JOB DESCRIPTIONS

5. ALIGNNMENT TO GENERIC JOB DESCRIPTIONS

APPENDIX A – JOB EVALUATION SCHEME FACTOR DEFINITIONS

APPENDIX B – JOB DESCRIPTION GUIDANCE

APPENDIX C – FLOW CHART FOR REVIEW OF EXISTING JOB DESCRIPTIONS TO CREATE GENERIC JOB DESCRIPTIONS

**1. INTRODUCTION**

This guide to preparing generic job descriptions has been created to provide support either due to general housekeeping of job descriptions, service changes or national initiatives generic job descriptions are created within NHS Fife.

To comply with the requirements of Agenda for Change, all generic job descriptions submitted for job matching must be up-to-date and agreed between the employee(s) covered by the original job descriptions and the appropriate manager(s).

**2. THE PURPOSE OF JOB DESCRIPTIONS**

**To Communicate the Organisation’s Expectations**

A key purpose of a job description is to identify for a postholder or group of postholders the contribution required by the organisation. It describes what is expected from the role that the member(s) of staff is employed to fulfil. It is the means by which postholder(s) understand what has to be achieved and the criteria by which performance will be assessed. This is very important for new jobs and for the new member(s) of staff.

**Factual Information Relating to the Job**

Collecting factual information about jobs is very important and the person(s) best placed to contribute to that information is the postholder(s). They know the job and can very readily provide accurate information about the actual content of the job. To fulfil the requirements of Agenda for Change, the final document is agreed and signed by the postholder(s) and their Manager(s), giving a shared understanding of the job being done and what is expected in terms of results.

Job Descriptions are used for a range of additional purposes:

**Recruitment and Selection** – job descriptions are a very valuable source of information in respect of recruiting new employees, providing a clear understanding of the job, the knowledge, skills and experience required form applicants. Internal and external candidates can be assessed against the job description.

**Training and development** – job descriptions can be used to identify training and development programmes required to equip individuals in meeting the full specification of their job.

Attached as **Appendix A** is the job evaluation scheme factors and **Appendix B** is the guidance on the creation of job descriptions as a reminder of good practice.

**3. PROCESS FOR CREATION OF GENERIC JOB DESCRIPTIONS**

In reviewing and preparing the generic job description, it is important that affected postholder(s) are appropriately engaged and involved in the creation of the generic job description.

Staff involved should have the opportunity to input and review the generic job description and involve their staff side representative, as appropriate.

It is anticipated that representatives from management, postholder(s), Human Resources and Staff Side will be involved in the production of generic job descriptions as services streamline the number of job descriptions within their local services.

**4. EVALUATION OF GENERIC JOB DESCRIPTIONS**

Once the generic job description has been created, these should be submitted to HR as part of the Job Evaluation process to confirm their banding remains consistent with the original banding outcome of the individual postholder(s) job description, in line with NHS Fife’s Evaluation of New Agenda for Change (AFC) Posts or Banding Review of Existing Posts Subject to Significant Change (Request for Grading Review), HR25.

The generic job description needs to reflect local service needs and fit within the overall organisational arrangements. Consideration should be given to existing roles with the local service and within the Board.

The banding outcome will be notified by the Senior HR Manager to the relevant manager(s) who submitted the request.

**5. ALIGNNMENT TO GENERIC JOB DESCRIPTIONS**

Once the generic job description has been agreed and banding confirmed, then individual or group discussions with the affected postholder(s) and their line manager(s) will take place to discuss the application of the generic job description for postholder(s) affected. This would normally involve HR and staff side representatives to ensure that appropriate process is followed. Reference and application of the Organisational Change policy may be required, if appropriate.

The purpose of this meeting will be to ensure the postholder(s) is fully aware of the requirements of the generic job description and to ensure they understand the job description they are now aligned to.

In the exceptional circumstances, if it considered they do not have all of the relevant skills to adequately perform the revised generic job description, then training will be put in place to enable the postholder(s) to be fully competent in the role.

**APPENDIX A**

**JOB EVALUATION SCHEME**

**FACTOR DEFINITIONS**

This section gives an outline of the kind of information within a job each of the factors will consider. It is drawn from the NHS Job Evaluation Handbook (September 2018) and included to assist in understanding what kind of information should be included in job descriptions and other supporting information.

**FACTOR 1: COMMUNICATION AND RELATIONSHIP SKILLS**

This factor measures the skills required to communicate, establish and maintain relationships and gain the co-operation of others. It takes account of the skills required to motivate, negotiate, persuade, make presentations, train others, empathise, communicate unpleasant news sensitively and provide counselling and reassurance. It also takes account of difficulties involved in exercising these skills.

**FACTOR 2: KNOWLEDGE, TRAINING AND EXPERIENCE**

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

**FACTOR 3: ANALYTICAL AND JUDGMENTAL SKILLS**

This factor measures the analytical and judgmental skills required to fulfil the job responsibilities satisfactorily. It takes account of requirements for analytical skills to diagnose a problem or illness and understand complex situations or information; and judgmental skills to formulate solutions and recommend/decide on the best course of action/treatment.

**FACTOR 4: PLANNING AND ORGANISATIONAL SKILLS**

This factor measures the planning and organisational skills required to fulfil the job responsibilities satisfactorily. It takes account of the skills required for activities such as planning or organising clinical or non-clinical services, departments, rotas, meetings, conferences and for strategic planning. It also takes account of the complexity and degree of uncertainty involved in these activities.

**FACTORS 5: PHYSICAL SKILLS**

This factor measures the physical skills required to fulfil the job duties. It takes into account hand-eye co-ordination, sensory skills (sight, hearing, touch, taste, smell) dexterity, manipulation, requirements for speed and accuracy, keyboard and driving skills.

**FACTOR 6: RESPONSIBILITIES FOR PATIENT/CLIENT CARE**

This factor measures responsibilities for patient/client care, treatment and therapy. It takes account of the nature of the responsibility and the level of the postholder’s involvement in the provision of care or treatment to patients/clients, including the degree to which the responsibility is shard with others. It also takes account of the responsibility to maintain records of care/treatment/advice/tests.

**FACTOR 7: RESPONSIBILITIES FOR POLICY AND SERVICE DEVELOPMENT AND/OR IMPLEMENTATION**

This factor measures the responsibilities of the job for development and implementation of policy and/or services. It takes account of the nature of the responsibility and the extent and level of the postholder’s contribution to the relevant decision making process, for instance, making recommendations to decision makers. It also takes account of whether the relevant policies or services relate to a function, department, division, directorate or employing organisation, or wider than this; and the degree to which the responsibility is shared with others.

**FACTOR 8: RESPONSIBILITY FOR FINANCIAL AND PHYSICAL RESOURCES**

This factor measures the responsibilities of the job for financial resources (including cash, vouchers, cheques, debits and credits, invoice payment, budgets, revenues, income generation); and physical assets (including clinical, office and other equipment, tools and instruments, vehicles, plant and machinery, premises, fittings and fixtures, personal possessions of patients/clients or others, goods, produce, stocks and supplies).

It takes account of the nature of the responsibility (e.g. careful use, security, maintenance, budgetary and ordering responsibilities); the frequency with which it is exercise; the value of the resources; and the degree to which the responsibility is shared with others.

**FACTOR 9: RESPONSIBILITIES FOR HUMAN RESOURCES**

This factor measures the responsibilities of the job for management, supervision, co-ordination, teaching, training and development of employees, students/trainees and others in an equivalent position. It includes work planning and allocation; checking and evaluating work; undertaking clinical supervision; identifying training needs; developing and/or implementing training programmes; teaching staff, students or trainees; and continuing professional development (CPD). It also includes responsibility for such personnel functions as recruitment, discipline, appraisal and career development; and the long term development of human resources.

The emphasis is on the nature of the responsibility, rather that the precise numbers of those supervised, co-ordinated, trained or developed.

**FACTOR 10: RESPONSIBILITIES FOR INFORMATION RESOURCES**

This factor measures specific responsibilities of the job for information resources (e.g. computerised; paper based; microfiche) and information systems (both hardware and software, e.g. medical records). It takes account of the nature of the responsibility (security; processing and generating information; creation, updating and maintenance of information databases or systems); and the degree to which it is shared with others. It assumes that all information encountered in the NHS is confidential.

**FACTOR 11: RESEARCH AND DEVELOPMENT**

This factor measures the responsibilities of the job for informal and formal clinical or non-clinical research and development (R&D) activities underpinned by appropriate methodology and documentation, including formal testing or evaluation of drugs, or clinical or non-clinical equipment. It takes into account the nature of the responsibility (initiation, implementation, oversight of research and development activities), whether it is an integral part of the work or research for personal development purposes; and the degree to which it is shared with others.

**FACTOR 12: FREEDOM TO ACT**

This factor measures the extent to which the postholder is required to be accountable for their own actions and those of others, to use own initiative and act independently; and the discretion allowed to the postholder to take action. It takes account of any restrictions on the postholder’s freedom to act imposed by, for example supervisory control; instructions, procedures, practices and policies; professional, technical or occupational codes of practice or other ethical guidelines; the nature of system in which the job operates; the position of the job within the organisation; and the existence of any statutory responsibility for service provision.

**FACTOR 13: PHYSICAL EFFORT**

This factor measures the nature, level, frequency and duration of the physical effort (sustained effort at a similar level or sudden explosive effort) required for the job. It takes account of any circumstances that may affect the degree of effort required, such as working in an awkward position or confined space.

**FACTOR 14: MENTAL EFFORT**

This factor measures the nature, level, frequency and duration of the mental effort required for the job (e.g. concentration; responding to unpredictable work patterns, interruptions and the need to meet deadlines).

**FACTOR 15: EMOTIONAL EFFORT**

This factor measures the nature, level, frequency and duration of the emotional effort required to undertake clinical or non-clinical duties that are generally considered to be distressing and/or emotionally demanding.

**FACTOR 16: WORKING CONDITIONS**

This factor measures the nature, level, frequency and duration of demands arising form inevitably adverse environmental conditions (such as inclement weather, extreme heat/cold, smells, noise, fumes) and hazards, which are unavoidable (even with the strictest health and safety controls), such as road traffic accidents, spills of harmful chemicals, aggressive behaviour of patients, clients, relatives, carers.

**APPENDIX B**

#### JOB DESCRIPTION GUIDANCE NOTES

The following provides guidance on development of Job Descriptions

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| JOB IDENTIFICATION |
| The information required in this section is straightforward and is required primarily for administration.  Please complete all sections apart from the job reference and note that the job holder(s) should not be named. It is intended that job descriptions will be anonymous for banding purposes.  Job Title:  Responsible to (insert job title):  Department(s):  Directorate:  Operating Division:  Job Reference:  No of Job Holders:  Last Update (insert date): |

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| 2. JOB PURPOSE |
| This section should consist of an accurate, concise statement in one sentence or paragraph of why the job exists. It should allow readers to immediately focus on the job’s overall role in the organisation and should provide an insight into the job and the context within which it works.  The job purpose statement should not be a lengthy review of the operation of the post and its problems. It should give a clear response to the question “why does the job exist?” and should seek to reflect the uniqueness of the job’s contribution. For example many different jobs in a finance department would fall within a job purpose statement that said “to assist in the day to day financial management of the organisation”. This would not be so helpful as a statement which reflected more specifically what the job has to do (e.g. by identifying the particular section in which the job operates, such as debtors or creditors).  It is often helpful to complete the remainder of the job description to develop an overall view of it, and then come back to this section to complete it, using the insights gained from the rest of the template to clarify thoughts on the job’s overall purpose. |
| **3. DIMENSIONS** |
| This section should reflect the size, scope and activity of the role. For managerial and supervisory jobs, it may be useful to be more specific e.g.   * size of capital and revenue budgets – when quoting figures, it is important to show only figures on which postholders’ activities have some impact; * staff numbers – show the total number of staff who report to the job, stating whether direct or through intermediate supervisors/managers. It is helpful to have a breakdown of existing grade, group and/or function for those jobs where large numbers of staff are involved;   For clinical jobs, it may be useful to describe the patient group dealt with and the interaction with other clinical and non-clinical staff e.g.   * provides housekeeping service to three wards; * develops care packages for specific groups of patients; * provides specialist non-clinical advice to specific groups of staff. |

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| 4. ORGANISATIONAL POSITION |
| The purpose of this section is to establish how the job fits into the rest of the organisation. It should be clear to whom the job holder is responsible and whether they have any other key lines of accountability, e.g. to a professional head. Please therefore record:   1. the manager’s job; 2. job titles of colleagues reporting to the same manager/peers; 3. jobs reporting directly to the job holder.     It is often more convenient to attach a separate sheet with the structure chart, rather than having to incorporate it in the body of the job description. This is perfectly acceptable – simply enter “organisation chart attached” in this section. |
| 5. ROLE OF DEPARTMENT |
| This section should provide an explanation of what the department, division or section does, so that anyone reading the job description will understand in general terms what activities it performs and give a clear indication of where the job fits in. |

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| 6. KEY RESULT AREAS |
| This is one of the most important sections of the job description. There is no one right way of completing this section for every job, but the aim should be to specify the key duties and responsibilities of the job.  Some jobs can be expressed best in terms of the key results or outputs of the job demonstrating what the responsibility is and why it is undertaken, not how. It is essential that the key results are a true reflection of the role to avoid under or over emphasising the extent/level of responsibility. For example often there can be confusion around the use of terminology relating to supervision and management of staff and it is important that this is clear in the job description e.g.   * Responsible for the day to day management of a group of staff including work allocation, performance/attendance issues, participating in recruitment, appraisal and personal development planning etc; * Responsible for supervision of reception staff, including work allocation and checking.   It may also be useful/necessary to list some of the principal activities of the role.  Other jobs are expressed best as a list of the actual tasks carried out as part of the job. Where possible, an approximate percentage of time spent on each main duty should be indicated. It is important however, that if listing tasks, that the level of involvement and role is clearly reflected.    A good example would be:   * Plans, evaluates and implements nursing care 70%.   However incomplete examples would be:   * Assists in X-Ray dept when required 10% - this does not reflect the actual role and further information would be required to confirm this; * Involvement in audit and research 5% - this does not give the reader an indication of the level and nature of audit and research.  Where it is a clear job requirement to periodically take charge of a work section, ward or department, the details of that requirement should be described, including the duration and frequency. |

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| 7a. EQUIPMENT AND MACHINERY |
| This section should describe the main machinery and/or equipment used in the job, or to which the job otherwise relates e.g. for maintenance. This could range from sophisticated medical equipment, to computers, to domestic cleaning machinery. It includes all clinical equipment such as syringes and blood pressure monitors. A brief description should be given of the use of the equipment in the job, even if it appears obvious to the job holder. |
| **7b. SYSTEMS** |
| This section should describe any systems that the post works with or contributes to, for example in relation to information management. This may range from keeping simple manual records to working with complex computer databases. The nature of the job’s role in relation to the system should be described (e.g. security, processing and generating information; inputting information on behalf of others; creation, updating and maintenance of information databases or systems) and the degree to which it is shared with others.  Examples might include:   * Completion of timesheets and forwarding them to the salaries department ; * Maintaining patient records; * Formatting and populating databases. |

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| 8. ASSIGNMENT AND REVIEW OF WORK |
| This section should contain an explanation of where work comes from/goes to, especially those items that are self-generated by the postholder. Most jobs operate within procedures, plans, budgets, projects, etc. Within professionals and managerial jobs, there is a strong emphasis on being able to anticipate problems or needs and to take steps to resolve them without being asked.  There should also be a clear indication of how the postholder is supervised and/or their work reviewed, e.g. personal contact, formal meetings, written reports, etc. There should be a clear indication of how the control works. |

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| **9. DECISIONS AND JUDGEMENTS** |
| Most jobs operate within defined procedures, plans, budgets, programmes, etc. In some jobs the day to day work is very clearly assigned by a manager or supervisor, whereas in other cases, particularly in professional and managerial jobs, the postholder is expected to anticipate problems or needs and get on with resolving them without being asked, eg developing managerial policies and procedures, patient diagnosis or planning care. However, even many task-focused jobs will still have some degree of discretion. For example this may simply be the order in which tasks are carried out.  In this section please describe:   * The areas of discretion, areas where the postholder is expected to anticipate or resolve problems independently; * Typical judgements made in the course of the job.   Where it is a clear job requirement to periodically take charge of a work section or department, the details of that requirement should be described, including the duration and frequency. |

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| 10. MOST CHALLENGING/DIFFICULT PARTS OF THE JOB |
| This section is intended to give a ‘feel’ for the job’s most challenging or difficult aspects of the job. The purpose of the question is to elicit information about the issues that confront the postholder and tax his or her skills the most. There should not normally be more than one or two of these.  For some jobs it may seem that there are no difficult aspects, and if that is the view of the postholder, it will be sufficient to say “not relevant” in this section. However it should be borne in mind that degrees of difficulty or complexity are relative to the nature of the job, and most will have some tasks, duties or responsibilities which are felt to be more complex/difficult/challenging than the rest, and it is helpful to be aware of what these are. This may include times when the job has reduced access to supervision or support such as when assigned to take charge of the department, or during standby or on-call duty). |

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| **11. COMMUNICATIONS AND RELATIONSHIPS** |
| This section should be used to describe:   * Who the job holder communicates with; * What the communication is about (for example, is it about clinical conditions, is it about appointments, is it about budgets? is it about service change?); * Any difficulties encountered in communication (either because of the subject matter or because of factors associated with the people who the job holder is communicating with).   This section may be split by internal and external communications. |

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| **12. PHYSICAL, MENTAL, EMOTIONAL AND ENVIRONMENTAL DEMANDS OF THE JOB** |
| This section should be used to describe the nature and frequency of:   * The physical skills needed for the job (e.g. requirements for speed and accuracy, keyboard and driving skills, manual handling skills.); * The physical effort needed for the job (e.g. moving equipment, manipulating patients, working in cramped or restricted position); * The mental demands of the job (e.g. concentration needed, extent to which workload is predictable, frequency of interruptions); * The emotional demands of the job (e.g. dealing with bereaved relatives, conveying unwelcome news to staff or patients); * Environmental and working conditions of the job (e.g. working with body fluids, inclement weather, exposure to verbal/physical aggression). |

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| 13. KNOWLEDGE, TRAINING AND EXPERIENCE REQUIRED TO DO THE JOB |
| This section is intended to identify the knowledge, training, qualifications and/or experience required to carry out the job. It should not take into account any additional qualifications or experience the current postholder may have. The stated level of knowledge should be that which would be required if the post were vacant and were to be advertised now, not what the existing postholder has. It should identify the essential requirements, not the desirable ones.    This section should include theoretical and practical knowledge; professional; specialist or technical knowledge; and knowledge of the policies, practices and procedures associated with the job. (The latter is particularly important where limited or no formal qualifications are required when recruiting). It takes account of the educational level normally expected as well as equivalent levels of knowledge gained without undertaking formal courses of study; and the practical experience required to fulfil the job responsibilities satisfactorily.  Generalised statements such as “requires extensive experience” should be avoided. If experience is essential, this section should state:   * The level of experience; * The length of experience; * How specialised the experience needs to be.   Where a competency profile has previously been devised for the job, this may be attached to the job description. |

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| **14. JOB DESCRIPTION AGREEMENT** | |
| A separate job description will need to be signed off by each postholder to whom the job description applies.  Job Holder’s Signature(s):  Head of Department Signature: | Date:  Date: |

**APPENDIX C**

#### FLOWCHART FOR REVIEW OF EXISTING JOB DESCRIPTIONS

#### TO CREATE GENERIC JOB DESCRIPTION

Initial discussions with group of staff involved regarding the generic job description. This will include discussion on potential amendments to role and implications

Individual confirmation process

with each postholder will take place

Banding outcome confirmed to

submitting Manager

Generic job description will go through local evaluation process, in line with HR25

Relevant Manager will develop and amend generic job description for consideration and agreement, considering all aspects, including any training