The purpose, scope and effect of job planning

1. Background

Participation in job planning has been an agreed requirement under national terms and conditions of service for consultants since 1991. The Consultant job planning - standards of best practice issued in 2003 apply to all medical and dental consultants employed by the NHS in England. They represent recommended guidance on best practice in relation to consultant job planning, both for consultants on the 2003 contract and those who remain on the old contract.

2. Job planning - purpose

“...A consultant job plan should be a prospective agreement that sets out a consultant’s duties, responsibilities and objectives for the coming year. In most cases, it will build upon the consultant’s existing NHS commitments.” (Consultant Job Planning – Standards of Best Practice)

Job planning should be based on a partnership approach. Initial job plans and subsequent changes will be agreed between the consultant and the clinical manager. The process for all consultants should take place annually as part of the Trust’s planning calendar. The timing of the commissioning process and the Local Delivery Plan (LDP) review process should be taken into consideration when setting the schedule for appraisal and job planning locally.

Job planning may also take place during the year on an ‘interim’ basis at the request of the consultant(s) or relevant manager, for example to take account of changes in clinical practice.

Job planning undertaken in this spirit of partnership should balance the needs of the Trust and the wider NHS with those of individual consultants. Within this context it is expected that all parties will participate openly in the process, and actively consider alternative ways of working to enable service improvements within the job planning context. For example, each time a new consultant post is approved (and prior to advertisement), the opportunity should be taken to review job plans and on-call commitments of all consultants within that specialty or department.

It is crucial that the local context of job planning is recognised and taken into account by the clinical manager and the consultant (or team) undergoing job plan review. This should be considered in advance of the job planning meeting. The challenge is to ensure that consultants are aware of the context to ensure that prospective plans fit in with organisational objectives tied into local and national objectives, personal objectives agreed in appraisal and the ability to develop a high quality service.

3. Scope

a. A prospective process

Except for newly appointed consultants, the job planning process needs to start by reviewing the current job plan in the light of future service needs, to question what the individual or team is doing and whether it will meet the future requirements of the population served. This may be supported by the use of activity records or diaries. The information gathered should be used to develop prospective job plans for teams and individuals. Where team plans are developed these should be converted into individual job plans with the addition of personal objectives.

For 2003 contract holders, where it is not possible to agree a job plan the consultant and clinical manager may refer outstanding issues to the mediation and appeals process.

b. Service development

The job planning process has a key role to play in creating a more flexible organisation, increasing capacity, improving resource utilisation and measuring and enhancing productivity as well as reducing excessive working hours. The job planning process is an opportunity to look at current working practices and to consider alternatives for the delivery of high quality services.

For example, this may involve, amongst many other possibilities:

- consideration of clinical priorities
- new ways of working individually and within teams
- cover and on-call arrangements.
Where changes and improvements can be implemented quickly these should be built into the new job plans. Where it is not possible to do this, action plans should be developed to make changes within agreed timescales.

Job planning and LDPs have to be integrated, each informing the other. Primary Care Trust (PCT) engagement in the process occurs through the LDP which needs to reflect the particular issues arising from job planning.

c. Team based job planning

There are two aspects to this.

Consultant teams: Many groups of consultants in a specialty act effectively as a team, sharing overall responsibility for the consultant input to a service. Agreeing the overall requirements for consultant input to service delivery, and the additional responsibilities of the department, such as supervision, teaching and research, can be a useful way to then move on to reflecting this in individual consultant job plans.

Multidisciplinary teams: In addition, many services are delivered by multidisciplinary teams where the consultant is a key player. Determining how workload will be distributed amongst the team offers scope to redistribute work currently done by the consultant that could be effectively and safely done by other team members.

It should be emphasised that an individual consultant job plan is still required, in order to fulfil the requirements for clinical excellence awards and pay progression.

d. Objectives

The development and agreement of objectives is now part of the job planning process. Personal objectives will usually be developed during the appraisal discussion and then brought to the job plan review meeting for agreement and linking to service and corporate objectives, where appropriate.

e. Supporting resources

To enable objectives to be reached, there needs to be a realistic discussion and agreements about the resources required.

4. An opportunity

The job planning process needs to be seen as an opportunity. It is an opportunity to think about the way consultants work and the way services are organised. It is an opportunity to review at least annually the way the organisation supports consultants and employs the skills of all staff. It is an opportunity to make clear what the longer term strategic aims of the service are and how consultants can support service improvement.