

Job planning guidance

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Job planning guidance

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General principles

1. Job planning will be based on a partnership approach and will be a mandatory part of the contract, on an annual basis undertaken at the same time, and forming a key element of the wider appraisal process. The clinical director or equivalent and the dentist will both normally prepare a draft job plan, which will then be discussed and agreement sought. The discussion should focus on the prospective timetable and list all the duties of the dentist, the number of hours for which the dentist is contracted and paid, a schedule for these duties, the dentist's objectives and agreed supporting resources. The dentist must fulfil their agreed duties and make best endeavours to meet their objectives.

Job content

2. The job plan will set out all of a dentist's NHS responsibilities and duties, and the service to be provided. The job plan will include any duties undertaken for other NHS employers.

Job schedule

3. This will set out how, when and where the dentist's responsibilities and duties will be delivered. Where necessary it will identify the dentist's normal place of work. The clinical director or equivalent will confirm the schedule after full discussion with the dentist, taking into account the dentist's views on resources and priorities and making every effort to reach agreement.
4. The employer will be responsible for ensuring that a dentist has the facilities, training development and support needed to deliver the commitments in the job plan and will make all reasonable endeavours to ensure that this support conforms with the standards set out in Improving Working Lives.
5. Non emergency work (outside contracted working hours) during weekdays or at weekends, will only be scheduled by mutual agreement between the dentist and his or her clinical manager, or in accordance with the dentist's contracted responsibilities or hours of employment.
6. Where a dentist participates in an on-call rota as part of their role, the job plan will set out the frequency of the rota.

Managerial responsibilities

7. The job plan will set out where applicable the dentist's management responsibilities.

Accountability arrangements

8. The job plan will set out the dentist's accountability arrangements, both professional and managerial.

Objectives

9. The job plan will include personal objectives that have been agreed between the dentist and his or her clinical director or equivalent. It will set out the relationship between these personal objectives and local service objectives.
10. The nature of the dentist's personal objectives will depend in part on his or her role but they may include objectives relating to:
 - competencies relevant to the dentist's pay band
 - clinical quality
 - high quality patient care
 - activity and efficiency
 - local service objectives
 - service development
 - management of resources, including efficient use of NHS resources
 - multi-disciplinary team working.
11. Objectives may refer to protocols, policies, patient care, procedures and work patterns to be followed. Where objectives are set in terms of output and outcome measures, these must be reasonable and agreement should be reached.
12. The objectives will set out a mutual understanding of what the dentist will be seeking to achieve over the annual period that they cover and how this will contribute to the objectives of the employing organisation. They will:
 - be based on past experience and on reasonable expectations of what should be achievable over the next period

- be underpinned by the relevant competencies from the competency framework for the appropriate band of post
- reflect different, developing phases in the dentist's career
- reflect the needs of the organisation
- be agreed on the understanding that delivery of objectives may be affected by changes in circumstances or factors outside the dentist's control, which will be considered at the job plan review.

Supporting resources

13. The job plan review should also identify the resources that are likely to be needed to meet these job plan commitments and objectives. They will also be used in identifying any potential organisational or system barriers that may affect the dentist's ability to meet these commitments or objectives.
14. The job plan will set out:
 - agreed supporting resources which may include facilities, administrative, clerical or secretarial support, office accommodation, IT resources and other forms of support
 - any action that the dentist and/or employing organisation agree to take to reduce or remove potential organisational or system barriers.

Job plan review

15. The job plan will be reviewed annually as a key component of the annual appraisal process. The annual review will examine all aspects of the job plan and should be used to consider amongst other possible issues:
 - what factors affected the achievement or otherwise of objectives
 - adequacy of resources to meet objectives
 - the impact upon patient care and ways of improving services
 - any possible changes to duties or responsibilities
 - ways of improving management of workload
 - the planning and management of the dentist's career.
16. The annual review will be informed by the same information systems that serve the appraisal process and by the outcome of the appraisal discussions.

17. The annual job plan review may result in a revised prospective job plan.
18. Following the annual job plan review, the clinical director or equivalent will report the outcome to the medical director or equivalent and copy to the dentist. If they wish, the dentist can meet with the medical director, or equivalent, to discuss any concerns that they may have about the job plan.
19. The dentist and clinical director or equivalent may conduct an interim review of the job plan where duties, responsibilities, accountability arrangements or objectives have changed or need to change significantly within the year. In particular, in respect of the agreed objectives in the job plan, both the dentist and clinical director or equivalent will:
 - keep progress against those objectives under review
 - identify to each other any problems in meeting those objectives as they emerge
 - propose an interim job plan review if it appears that the objectives may not be achieved.

Mediation and appeals

20. Wherever possible, disagreements over job planning should be resolved by referral to the medical director or equivalent for mediation to be arranged between the dentist and clinical director or equivalent. If matters are not resolved in this way there will be access to an appeal process as outlined in schedule 6 of the terms and conditions of service.

Job plan guidance notes and template

Introduction

21. The job planning process is described in schedule 4 of the salaried primary dental care services terms and conditions of service. This section suggests a number of steps that can be taken in order to achieve an agreed job plan.
22. A number of people are involved in the job planning process. The most important being the dentist and the clinical director or lead clinician who is responsible for ensuring that all job plans have been agreed and signed off.
23. While developing the job plan the following points should be considered:
 - it should be developed in the spirit of partnership
 - it is an agreement that sets out objectives (both professional and personal), duties and responsibilities for the coming year
 - resources and support should be identified and agreed
 - it should cover all aspects of a dentist's professional practice
 - it should cover the requirements of the organisation/employer
 - it may be built onto the previous year's plan
 - the plan may include team activities
 - the process is separate from, but linked to, appraisal.
24. There should be an annual review of the job plan. Information required in the job plan is similar to that required for the appraisal process and therefore each process should take place as close together as possible. The purpose of the review will be to determine:
 - what factors affected the achievement or otherwise of objectives
 - adequacy of resources to meet objectives
 - any possible changes to duties or responsibilities
 - ways of improving management of workload
 - the planning and management of the dentist's career.

Guidance on completing job plans

25. This section provides a brief guide to completing the suggested template, as per below, together with a worked example.
26. The template is broken down into nine sections as follows:
 1. **Weekly schedule** – this section provides a summary of duties and responsibilities in the working week, including the number of hours an activity takes up and any differences in location.
 2. **Objectives** – this section outlines any personal objectives and identifies the relationship between personal and organisational objectives.
 3. **Supporting resources** – please provide details of any supporting resources such as administrative, clerical or secretarial support, IT resources and other forms of support and as well as any comments.
 4. **Accommodation** – please provide details of the facilities available, such as office accommodation or clinical accommodation and any comments.
 5. **Equipment** – please provide details of the type of equipment available. Please include comments on suitability of equipment, whether any equipment requires updating or is not available etc.
 6. **External duties** – please provide details of any activities for other organisations.
 7. **Other comments or agreements** – this section allows for any additional comment or agreement not covered elsewhere in the job plan.
 8. **Additional** – this section clarifies whether any other work is undertaken.
 9. **Sign off** – both the dentist and his or her clinical manager are to agree and sign off the job plan.

Job plan form

Name: _____

Job title: _____ Date: _____

Weekly schedule

Day	Time	Location	Work- nominal allocation	Category	Hours
Total hours					

Objectives

Organisational objectives	Team or directorate objectives	Personal objectives

Supporting resource

Role (staff)	Comments

Accommodation

Organisation	Comments

Equipment

Type	Comments

External duties

Organisation	Details

Other comments or agreements

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Additional

	Yes/no
1. Are you undertaking: a. any other NHS work? b. any other professional non-NHS work? c. any other paid employment (Working Time Directive)?	
2. If yes, how many sessions and at what times?	

Signed off and agreed

Dentist name: _____

Signed (dentist): _____

Date: _____

Clinical director or equivalent : _____

Signed (clinical director or equivalent): _____

Date: _____

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