

Agenda for change **Job analysis questionnaire**



Introduction to the Job Analysis Questionnaire (JAQ)

This questionnaire is designed to obtain all the information necessary to evaluate your job locally. It may seem long and sometimes repetitive but it is very important that you take the time to complete it fully and provide relevant and clear examples about your job. If the Evaluation Panel does not have all the information it needs, it will not be able to evaluate your job properly.

Why do I have to complete a JAQ?

As there is not an appropriate nationally agreed profile for your job, it has to be assessed by a Panel made up of trained evaluators who, working in management and trade union partnership, will use the NHS Job Evaluation Scheme to evaluate the job information provided in the JAQ so that the job can be placed in the appropriate pay band.

If other people do the same job, do we all need to complete a JAQ?

Where there is more than one person doing a job there are a number of options for completion, including the following:

One of the jobholders can volunteer (or be selected) to complete a JAQ and be interviewed by Job Analysts: the completed JAQ is circulated to other jobholders for comment both before the interview and, if there are changes, after the interview, before being signed off.

Jobholders can work together to complete a JAQ and then select one to represent them all at the interview with the Job Analysts. This option works best where jobholders work together in the same work location.

It is effective, but can be time consuming.

Where jobholders work in different locations, one option is for one jobholder from each location to complete the JAQ, as described above and then meet together to produce a single JAQ and select a representative for interview. Again

this is time consuming but would give participants a sense of ownership. Alternatively, jobholders may nominate one jobholder to complete the JAQ and then send it to the others for comment and agreement afterwards.

You will be advised which of the above options has been agreed locally, on a partnership basis for your job.

How should I complete the JAQ?

It can be completed by hand or electronically, using Adobe Acrobat. If you have a choice, it is preferable for the analysts and the Evaluation Panel to have a JAQ which has been completed electronically, as it can be duplicated easily. It is clearer for the panel to read and agreed amendments can be made neatly.

Whichever way you choose, answer the questions in your own words and, if you are familiar with the NHS Job Evaluation Scheme, try to avoid key phrases which are contained in it as these are unhelpful and do not describe the type of activity/task. If you want to use the same example to answer a different question, there is no need to write it out again. You can just refer to the first example.

Is there any guidance on how to complete it?

There is guidance in the interactive help facility and in the JAQ guidance document, which can be read electronically or printed and used as a reference document. It is helpful to read each question in the JAQ and then read the guidance relating to it before answering the question. For those sections with a series of Yes/No boxes, it is sensible to work through the questions first, putting ticks in the boxes, as appropriate. Then consider the examples you want to use and allocate them to the Yes box options. This provides a better range of examples to evaluators and helps avoid repetitive box filling for you.

Using the interactive 'Help'

The electronic interactive 'Help' facility can be accessed by moving the cursor over the ⓘ icon or corresponding shaded area and waiting one second. Guidance will then be displayed on the screen. Please note that the shaded boxes are not associated with the Help system, but are designated as the areas to enter data. To make sure the interactive buttons work correctly, please use the latest version of Adobe Acrobat.

What duties should I include?

The JAQ takes into account all the duties you are required to carry out. Think what you do in a typical week, start from the beginning and work through each day. If your job varies from week to week or has a monthly cycle, look at your diary to help to list your activities. You should include those duties agreed by you and your manager to be part of the job. These may be more, or less, than the duties listed on your formal job description. When you have completed the JAQ, it is sometimes helpful to keep it with you for a few days so that you can add anything else that comes to mind. Be sure however to keep in mind the date it has to be completed by, so that the process is not delayed.

How much information should I include?

Wherever there is a question that you have ticked or answered 'Yes', there should be a clear, factual answer. It should be detailed enough to enable someone who does not know the job to understand what you do. Please avoid including unnecessary information as this can be confusing. Also avoid initials or jargon, as these may not be understood.

Can I get help from other people?

Yes, it is a good idea to talk to others who know about the job when completing the JAQ, for example:

- Colleagues who do a different job but work closely with you
- Colleagues who do the same or a similar job to you
- Staff representative(s) for your area of work
- Supervisor and/or line manager
- Trained staff member dedicated to do this (where available).

Should I refer to any documents?

It may be helpful to refer to a job description or person specification, especially if it is agreed as up-to-date and accurate. Your line manager or the

HR department will probably be able to supply these. An organisation chart, induction materials and department reports may also be useful if they include a description of your work.

Does the JAQ ask me to list what I think I have done particularly well?

No, Job Evaluation is concerned with WHAT you do, not how well you do it. It takes no account of performance.

What will the Job Analysts do?

The Job Analysts are trained NHS staff and when you have finished completing the JAQ, two analysts (one management, one staff representative) will go through the JAQ with you to ensure that you have not left anything out, the examples provided are clear to people who do not know your work and that the JAQ accurately reflects the job duties and responsibilities you describe. They will also, where possible, answer any questions concerning what will be happening next.

Will the Job Analysts make any changes to the JAQ?

They may suggest making some amendments, with your agreement, where they think that it can be improved or where it may be misunderstood or misleading. Their aim is to ensure that the JAQ is clear, complete, concise and correct.

What will happen after I have agreed the JAQ with the Job Analysts?

The completed JAQ needs to be agreed by your manager and signed off by you, your manager and both Job Analysts at the end of the process. It then goes to the Evaluation Panel.

Job Analysis Questionnaire

Job Reference Number

Date issued

Job title
Principal purpose of job (job statement) In no more than two sentences, please describe the principal purpose(s) of your job. This can be taken from your job description.
Organisation chart Please draw an organisation chart showing your job and the jobs two levels above and two levels below (where possible) by job title only. Click in the box below to insert the image of your organisation chart.

Main tasks

Please list the **main tasks** within your job and indicate any tasks, which are only carried out occasionally. Provide enough detail to enable readers to understand what you do. **Please also indicate the approximate proportion of your time spent on each task.** This may be over a typical week if your job has a weekly work cycle or over a month or year for jobs, which vary seasonally.

Main tasks	% of time spent on this, rounded to the nearest 5%

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, empathise, communicate unpleasant news sensitively and provide counselling and reassurance.

1.1 Please answer the following questions and provide examples for communication that has occurred in the last 12 months. State whether the communication is with other employees, patients/clients or their carers, or with the general public/external organisations.

Do you	Yes/No	Please give a typical example Remember to move the cursor over the yellow shaded area to access guidance notes.
1.1.1 Describe/explain?	Yes No	
1.1.2 Persuade or influence?	Yes No	
1.1.3 Negotiate?	Yes No	
1.1.4 Motivate?	Yes No	
1.1.5 Use tact/diplomacy?	Yes No	
1.1.6 Use empathy?	Yes No	
1.1.7 Counsel?	Yes No	
1.1.8 Re-assure?	Yes No	

Do you	Yes/No	Please give a typical example Remember to move the cursor over the yellow shaded area to access guidance notes.
1.1.9 Give advice, instruction and training?	Yes No	
1.1.10 Communicate to groups/ give presentations?	Yes No	
1.1.11 Communicate in a language other than English?	Yes No	
1.1.12 Overcome barriers to understanding?	Yes No	
1.1.13 Communicate complicated information?	Yes No	
1.1.14 Communicate sensitive information?	Yes No	
1.1.15 Communicate in an emotive atmosphere?	Yes No	
1.1.16 Communicate information which may be contentious?	Yes No	
1.1.17 Communicate in a hostile/antagonistic atmosphere?	Yes No	

Knowledge, training and experience

- 2.1 Please describe the knowledge of work procedures/practices (i.e. methods of doing things) and the administrative, clinical, therapeutic, social care, scientific, technical, managerial and professional knowledge which you need for your job in the table below. Please look first at the box on the left and then work across, stating whether you need any knowledge in this area, describing the range of procedures, how the knowledge is usually obtained and the qualifications/knowledge that you actually require to enable you to do your job.**

Further guidance is available in Appendix 1 at the end of the document.

Note: *Where courses are part-time please state the full time equivalent or quote the amount of time per week/year required for course completion.

Knowledge required in job	Yes/No	Q1 Please give examples of the work procedures/practices you need to know about in your job	Q2 Describe the type and length of experience or on-the-job training that is required to gain this knowledge	Q3 Describe the minimum qualifications that are required for this job and how long it normally takes to acquire them*
2.1.1 Clinical/therapeutic/social care knowledge	Yes No			
2.1.2 Administrative knowledge	Yes No			
2.1.3 Technical knowledge (including knowledge of equipment)	Yes No			
2.1.4 Scientific knowledge	Yes No			
2.1.5 Managerial knowledge	Yes No			

Knowledge required in job	Yes/No	Q1 Please give examples of the work procedures/practices you need to know about in your job	Q2 Describe the type and length of experience or on-the-job training that is required to gain this knowledge	Q3 Describe the minimum qualifications that are required for this job and how long it normally takes to acquire them*
2.1.6 Additional specialist knowledge	Yes No			
2.1.7 Knowledge of legislation, codes of practice	Yes No			
2.1.8 Other types of knowledge not already covered but required for the job	Yes No			

2.2 Please list below the qualifications or experience actually required for your post.

Analytical and judgemental skills

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

3.1 Complete the appropriate boxes about the nature of the judgements you have to make regularly in the course of your work.

Do you	Yes/No	Please give a typical example
3.1.1 Make judgements where the situation is straightforward?	Yes No	
3.1.2 Make judgements where the situation is not straightforward?	Yes No	
3.1.3 Make judgements where there is a range of options to select from?	Yes No	
3.1.4 Assess or interpret information in order to make a judgement?	Yes No	
3.1.5 Make judgements where expert opinion may differ or be conflicting?	Yes No	

Planning and organisational skills

This factor measures the planning and organisational skills required to fulfil the responsibilities of the job satisfactorily, for example, for clinical or non-clinical planning, including strategic planning and organising services, departments, rotas, meetings and conferences.

4.1 Does your job require you to plan or organise any of the following? If so, complete the relevant boxes.

Note: *Time in advance of the event means the period that the plan is to cover, starting with the day it is prepared.

Do you plan or organise	Yes/No	Please describe what you do and whether you need to make changes to the plans/arrangements	Time in advance of event*
4.1.1 Own time?	Yes No		
4.1.2 Time of others?	Yes No		
4.1.3 Rotas?	Yes No		
4.1.4 Meeting arrangements?	Yes No		
4.1.5 Conference arrangements?	Yes No		
4.1.6 Co-ordinating other agencies/organisations?	Yes No		
4.1.7 Project management?	Yes No		

Do you plan or organise	Yes/No	Please describe what you do and whether you need to make changes to the plans/arrangements	Time in advance of event*
4.1.8 Service provision?	Yes No		
4.1.9 Educational or training programmes?	Yes No		
4.1.10 Long term strategic planning?	Yes No		
4.1.11 Other, please specify?	Yes No		

4.2 Does any of your planning affect departments, staff or management across the organisation or in other organisations?

Yes No If 'Yes', please describe.

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, smell, taste), dexterity, manipulation, requirements for speed and accuracy, keyboard and driving skills.

5.1 Does your job require physical skills? If so, please tick the box(es) next to the appropriate activity and provide an example of how the skill is used.

Skills required for	Description of skill	Yes/No	Please describe the purpose for which you use this skill
5.1.1 Driving a car/small van	Standard driving skills (car/light van driving test + practice)	Yes No	
5.1.2 Driving a lorry/heavy vehicle/patient transport services	Advanced driving skills (HGV, PSV, PCV driving test or equivalent + practice)	Yes No	
5.1.3 Driving vehicles in emergency situations	High speed driving skills (ambulance driving test or equivalent + practice)	Yes No	
5.1.4 Standard keyboard use	Typing skills normally acquired through practice or RSA1 or equivalent	Yes No	
5.1.5 Advanced keyboard use	High speed, accurate typing skills; RSA level 2/3 or equivalent	Yes No	
5.1.6 Use of equipment/tools	Skills normally acquired through practice or during practical training	Yes No	
5.1.7 Non-intravenous injections	Skills normally acquired through practice or during practical training	Yes No	
5.1.8 Restraint of patients/clients	Skills requiring formal training and updating	Yes No	
5.1.9 Manipulation of objects/ tools where narrow margins for error	Developed skills* e.g. laying out instrument trays; fine adjustment of equipment/plant	Yes No	
5.1.10 Hand signing	Skills requiring formal training	Yes No	

Skills required for	Description of skill	Yes/No	Please describe the purpose for which you use this skill
5.1.11 Advanced sensory skills	Developed skills* e.g. listening for speech defects	Yes No	
5.1.12 Manipulation of fine tools; where accuracy important	Developed skills* e.g. operating a lathe/ manual control of intravenous infusions	Yes No	
5.1.13 Manipulation of materials where accuracy important	Developed skills* e.g. manipulating materials on a slide or under microscope	Yes No	
5.1.14 Assembly of surgical equipment; accuracy important	Developed skills* e.g. assembling equipment in theatre/assembling boiler pump	Yes No	
5.1.15 Intravenous injections	Developed skills* accuracy and hand-eye co-ordination	Yes No	
5.1.16 Manoeuvring people where accuracy important	Developed skills* requiring accuracy and hand-eye co-ordination e.g. for a precise procedure	Yes No	
5.1.17 Suturing	Developed skills* requiring precision or speed + hand-eye, sensory co-ordination	Yes No	
5.1.18 Manual physiotherapy treatment	Developed skills* requiring precision + hand-eye, sensory co-ordination	Yes No	
5.1.19 Surgical interventions	Developed skills* requiring precision or speed + hand-eye, sensory co-ordination; includes intubation and tracheotomy	Yes No	
5.1.20 Keyhole, laser surgery, IVF procedures	Developed skills* requiring the highest level of physical skill	Yes No	
5.1.21 Other physical skill	Please state	Yes No	

Responsibility for patient/client care

This factor measures the responsibilities of the job for patient/client care, treatment and therapy, taking into account the nature of the responsibility and the level of the jobholder's involvement in the provision of care or treatment to patients/clients. It also takes account of the responsibility to record care/treatment/advice/tests.

6.1 Do you have any responsibility for providing services to patients/clients such as cleaning or food delivery, personal care, clinical or non-clinical advice, technical services, treatment, therapy or the registration, inspection or quality assurance of facilities or services for patients/clients?

Yes No If 'Yes', go through all the sections below. If 'No' go to Q 6.5.

Please tick answer all questions and for all those you have answered 'Yes' describe what you do on the next page

6.2 General services

Do you have responsibility for providing any of the following?	Yes/No	
6.2.1 Providing general non-clinical advice or information directly to patients/clients?	Yes	No
6.2.2 Providing a cleaning or food delivery service directly to, or in the immediate vicinity of patients/clients?	Yes	No
6.2.3 Providing personal care (assisting with feeding, bathing, appearance), or portering services directly to patients/clients?	Yes	No
6.2.4 Implementing clinical care/treatment/therapy programmes/packages?	Yes	No
6.2.5 Assessing clinical care needs and developing clinical care/treatment/therapy programmes/package?	Yes	No
6.2.6 If 'Yes', are these in a specialist field or do they cover a broad range of situations?	Yes	No

6.3 Clinical/therapeutic advice; advice on facilities/services

Do you have:	Yes/No	
6.3.1 Direct involvement in the provision of basic clinical/therapeutic advice to patients/clients?	Yes	No
6.3.2 Involvement in the registration, inspection or quality assurance of facilities/services for patients/clients?	Yes	No
6.3.3 Direct involvement in the provision of clinical/therapeutic advice to patients/clients?	Yes	No
6.3.4 If 'Yes', are these in a specialised area of practice?	Yes	No
6.3.5 If 'Yes', are these in an expert area of practice?	Yes	No

6.4 Clinical technical services

Do you have?	Yes/No	
6.4.1 Direct involvement in the provision of basic clinical technical services to patients/clients?	Yes	No
6.4.2 Direct involvement in the provision of clinical technical services to patients/clients?	Yes	No
6.4.3 If 'Yes', do you provide clinical technical services which are of a specialist nature?	Yes	No
6.4.4 If 'Yes', are these of a highly specialist nature in an expert area of practice?	Yes	No

6.5 Direct delivery of a service

Are you responsible for:	Yes/No	
6.5.1 Direct delivery of a clinical, clinical technical, therapeutic or social care service?	Yes	No
6.5.2 If 'Yes', do you have corporate responsibility for this?	Yes	No

If you have said 'Yes' to any of the points in 6.2 to 6.5 above please describe your involvement below, starting with the one that is the most applicable to your job.

Policy and service development

This factor measures the responsibilities of the job for development and implementation of policy and/or services, taking into account the nature of the responsibility and the extent and level of the jobholder's contribution to the relevant decision making process, for instance, making recommendations to decision makers and the scope of the relevant policies or services.

7.1 Please select the options on the left which accurately reflect the requirements of your job concerning policies and procedures and complete the boxes in that row.

Responsibility for policies	Yes/No	Please describe the types of policies you are involved with, and what you are required to do	Department/ Area Covered
7.1.1 Are you required to comment on policy that is used within your area?	Yes No		
7.1.2 Do you actively implement policy within your section/department/service/directorate or the whole organisation?	Yes No		
7.1.3 Are you required to propose changes to policies or procedures that are used in your section/department/service and/or other areas?	Yes No		
7.1.4 Are you involved with the creation of policy that impacts on a service/directorate/the whole organisation/other organisations?	Yes No		
7.1.5 Are you involved with service development for a service/directorate/the whole organisation/other organisations?	Yes No		
7.1.6 Do you have corporate responsibility for the creation of policy within your organisation?	Yes No		

Financial and physical resources

This factor takes account of the type of responsibility (i.e. what you are responsible for) and the nature of that responsibility (for example, careful use, security, maintenance, budgetary, ordering and purchasing responsibilities) and the frequency with which it is exercised.

8.1 Physical Assets

Responsibility for policies	Yes/No	Description	Delegated authority level or value (£)	Are you a signatory for this responsibility?	Do you share this responsibility? If Yes, with whom?
8.1.1 Are you responsible for the safe use of equipment used by others?	Yes No		Not required	Not required	
8.1.2 Do you use expensive or highly complex equipment?	Yes No		Value of most expensive piece of equipment = £	Not required	Not required
8.1.3 Do you have responsibility for security of a site?	Yes No		Not required	Not required	
8.1.4 Do you repair, maintain or install physical assets?	Yes No		Not required	Not required	
8.1.5 Are you responsible for the maintenance of all physical assets for an area?	Yes No		Not required	Not required	
8.1.6 Are you responsible for the purchase of equipment/materials?	Yes No		Annual value of purchases = £		
8.1.7 Do you undertake purchasing as a major part of your role?	Yes No		Annual value of purchases = £		

Responsibility for policies	Yes/No	Description	Delegated authority level or value (£)	Are you a signatory for this responsibility?	Do you share this responsibility? If Yes, with whom?
8.1.8 Are you responsible for the physical assets for several services?	Yes No				
8.1.9 Do you have corporate responsibility for physical assets?	Yes No				Not required

8.2 Stocks and Supplies

Responsibility	Yes/No	Description	Delegated authority level or value (£)	Are you a signatory for this responsibility?	Do you share this responsibility? If Yes, with whom?
8.2.1 Is a significant part of your role the security of stock or supplies?	Yes No		Value of goods = £	Not required	
8.2.2 Are you responsible for ordering or controlling stock and supplies used in the course of your work?	Yes No		Annual value of goods ordered = £		
8.2.3 Are you responsible for the purchase of stock and supplies?	Yes No		Annual value of purchases = £		
8.2.4 Do you undertake purchasing as a major part of your role?	Yes No		Annual value of purchases = £		

8.3 Financial resources

Note: * = Delete as necessary

Responsibility	Yes/No	Description	Delegated authority level or value (£)	Are you a signatory for this responsibility?	Do you share this responsibility? If Yes, with whom?
8.3.1 Do you handle cash, cheques or patients' valuables?	Yes No			Not required	Not required
8.3.2 Do you check and verify expense sheets, purchase documents or similar?	Yes No		Total value = £ per week/month/year*	Not required	
8.3.3 Are you an authorised signatory for invoices, overtime etc.?	Yes No		Total value = £ per week/month/year*		
8.3.4 Do you monitor financial information?	Yes No			Not required	Not required
8.3.5 Are you involved in drawing up budgets or financial initiatives?	Yes No			Not required	
8.3.6 Is your budget delegated to you by your manager?	Yes No			Not required	Not required
8.3.7 Are you a budget holder?	Yes No				
8.3.8 Are you involved with the setting of the budget for your department/service?	Yes No			Not required	

Responsibility	Yes/No	Description	Delegated authority level or value (£)	Are you a signatory for this responsibility?	Do you share this responsibility? If Yes, with whom?
8.3.9 Are you involved with the budget setting of more than one department/ service/organisation?	Yes No			Not required	
8.3.10 Do you have responsibility for determining the budget levels for one or more departments/services or organisations?	Yes No		Not required		
8.3.11 Do you have corporate responsibility for the financial stewardship of the organisation(s)?	Yes No				

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.

9.1 Physical assets

Responsibility	Yes/No	For how many people?	Please describe the nature of the responsibility
9.1.1 Are you responsible for the day-to-day work allocation, supervision or co-ordination of staff?	Yes No		
9.1.2 Are you responsible for the clinical or professional supervision of staff?	Yes No		
9.1.3 Do you manage a group of staff within a department/function?	Yes No		
9.1.4 Department/function?	Yes No		
9.1.5 Do you manage a number of departments/functions?	Yes No		

9.2 Training and teaching

Responsibility	Yes/No	For how many people?	Please describe the nature of the responsibility
9.2.1 Do you train new people in the department?	Yes No		
9.2.2 Are you required to deliver formal training?	Yes No		
9.2.3 Are you required to undertake work place assessments?	Yes No		

Responsibility	Yes/No	For how many people?	Please describe the nature of the responsibility
9.2.4 Are you responsible for the placement or allocation of staff or students?	Yes No		
9.2.5 Is your role concerned with the delivery of core training or teaching as a significant responsibility?	Yes No		
9.2.6 Is your role principally concerned with devising and delivering training programmes?	Yes No		
9.2.7 Are you responsible for the overall management of the teaching or training function?	Yes No	Not required	

9.3 Human Resources Advice

Responsibility	Yes/No	For how many people?	Please describe the nature of the responsibility
9.3.1 Do you offer basic HR advice as part of your role?	Yes No		
9.3.2 Are you responsible for giving core HR advice to managers?	Yes No		
9.3.3 Do you deliver an HR service across a number of departments or services?	Yes No		
9.3.4 Are you responsible for a significant part of the HR function in your organisation?	Yes No		
9.3.5 Do you have corporate responsibility for the HR function?	Yes No		

Information resources

This factor measures the responsibilities of the job for all forms of information resources and information systems (for example, computerised, paper based, microfiche). 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.

10.1 Please select the options on the left which accurately reflect the requirements of your job concerning policies and procedures and complete the boxes in that row.

Responsibility	Yes/No	Describe your involvement	How often (daily, weekly, monthly, yearly)
10.1.1 Are you required to make or word process clinical records, letters, reports etc. compiled by others?	Yes No		
10.1.2 Are you required to complete a timesheet or similar records?	Yes No		
10.1.3 Are you required to process data e.g. test results, statistics etc. compiled by others?	Yes No		
10.1.4 Are you responsible for the storage of data and for its distribution to others?	Yes No		
10.1.5 Are you required to take and transcribe formal minutes?	Yes No		

10.2 Use of computer software for design, development or data manipulation

Are you responsible for	Yes/No	Describe your involvement	How often (daily, weekly, monthly, yearly)
10.2.1 The creation of spreadsheets, including the programming of formulae?	Yes No		
10.2.2 Manipulating data using spreadsheets, databases or other software?	Yes No		
10.2.3 Creating designs, drawings, layouts using software; other computer aided design (CAD) work?	Yes No		

10.3 System Design, Operation and Maintenance

Responsibility	Yes/No	Describe your involvement	How often (daily, weekly, monthly, yearly)
10.3.1 Are you responsible for maintaining information systems/installing software?	Yes No		
10.3.2 Are you responsible for the adaptation, design or development of information systems?	Yes No		
10.3.3 Are you responsible for the operation of information systems as a major job responsibility?	Yes No		
10.3.4 Is the main part of your role the management of information systems?	Yes No		
10.3.5 Do you have corporate responsibility for system development and management for your organisation or a number of organisations?	Yes No		

Research and development

This factor measures the responsibilities of the job for informal and formal clinical and/or non-clinical research and development activities underpinned by appropriate methodology and documentation, including formal testing or evaluation of drugs, or clinical or non-clinical equipment.

11.1 Please select the options on the left which accurately reflect the requirements of your job concerning policies and procedures and complete the boxes in that row.

Are you required to do any of the following?	Yes/No		If Yes, how often do you do this per year?	How much time do you spend on it per year?
11.1.1 Carry out surveys?	Yes	No		
11.1.2 Carry out audits?	Yes	No		
11.1.3 Participate in R & D, clinical trials or equipment testing led by others?	Yes	No		
11.1.4 Carry out research/development work which is not part of a formal research programme?	Yes	No		
11.1.5 Carry out research/development work which is part of a formal research programme?	Yes	No		
11.1.6 Carry out clinical trials?	Yes	No		
11.1.7 Carry out your own equipment testing or adaptation?	Yes	No		
11.1.8 Co-ordinate/implement R & D programmes/activities?	Yes	No		
11.1.9i Initiate & develop R & D programmes/activities?	Yes	No		
11.1.9ii and do the programmes/activities impact on other trusts or organisations?	Yes	No		
11.1.10 Secure funding for R & D programmes/activities?	Yes	No		

If you have said YES to any of the points in 11.1.1 to 11.1.10 on the previous page, please describe your involvement below, starting with the one that is the most applicable to your job. For easy reference, write the number you are describing e.g. 11.1.4 in the left hand column.

Question number	

Freedom to act

This factor measures the extent to which the jobholder is required to be accountable for own actions and those of others, to use own initiative and act independently and the discretion allowed to the jobholder to take action. It takes account of any restrictions on the jobholder'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.

12.1 Supervision and management

	Yes/No	Describe the supervision, management or guidance you receive
12.1.1 Is your work checked on a regular basis? (e.g. daily)	Yes No	
12.1.2 Is your work checked on a sample/random basis?	Yes No	
12.1.3 Is your work assessed at agreed intervals? (e.g. monthly, quarterly)	Yes No	
12.1.4 Is your supervisor/ manager generally close by or immediately contactable?	Yes No	
12.1.5 Is your supervisor/ manager generally only available at specific times?	Yes No	
12.1.6 Do you refer to people outside the organisation for guidance?	Yes No	
12.1.7 Are you a lead specialist, professional or expert in your field?	Yes No	

12.2 Describe the areas of responsibility where you would act yourself without asking for assistance

12.3 Describe the areas of responsibility where you would ask for

12.4 Constraints, policies and procedures

	Yes/No	Describe the policies, guidelines, procedures or legislation that you are required to work within
12.4.1 Are there clear policies and procedures that you are not allowed to deviate from?	Yes No	
12.4.2 Are you required to work to policies and procedures (SOPs), but use your initiative when non-routine situations arise?	Yes No	
12.4.3 Is your work assessed at agreed intervals? (e.g. monthly, quarterly)	Yes No	
12.4.4 Do you work to broad professional standards and have significant discretion to operate within these?	Yes No	

	Yes/No	Describe the policies, guidelines, procedures or legislation that you are required to work within
12.4.5 Are you responsible for determining how certain broad policies should be put into practice?	Yes No	
12.4.6 Are you required to take action based on your own interpretation of national policies/legislation/initiatives?	Yes No	
12.4.7 Are you responsible for setting targets and goals for a department/division/service/organisation?	Yes No	

Physical activity

This factor measures 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.

13.1 Does your job require any of the following

Job requirements	Yes/No	Please give an example(s)				
			Average number of shifts per week	Number of times per shift	Average duration of each occurrence	Average weight
13.1.1 Lifting, pushing, pulling objects?	Yes No					
13.1.2 Bending, kneeling, crouching, stretching?	Yes No					Not required
13.1.3 Crawling, climbing?	Yes No					Not required
13.1.4 Working in physically cramped conditions?	Yes No					Not required
13.1.5 Working at heights?	Yes No					Not required
13.1.6 Standing/sitting with limited scope for movement for long periods?	Yes No					Not required
13.1.7 Walking for substantial periods of time?	Yes No					Not required
13.1.8 Making repetitive movements?	Yes No					Not required

Job requirements	Yes/No	Please give an example(s)				
			Average number of shifts per week	Number of times per shift	Average duration of each occurrence	Average weight
13.1.9 Controlled restraint? i.e. jobs requiring training/ certification in this	Yes No					Not required
13.1.10 Running?	Yes No					Not required
13.1.11 Lifting weights/ equipment with mechanical aids?	Yes No					
13.1.12 Clearing tables?	Yes No					Not required
13.1.13 Manoeuvring/ manipulating objects/people?	Yes No					
13.1.14 Transferring people from bed to chair or similar?	Yes No					
13.1.15 Lifting weights/ equipment without mechanical aids?	Yes No					
13.1.16 Manual digging?	Yes No					Not required
13.1.17 Heavy-duty pot washing/oven cleaning?	Yes No					Not required
13.1.18 Other, please specify	Yes No					

Mental effect

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 deadline).

14.1 Concentration

Further guidance is available in Appendix 1 at the end of the document.

Note: *This should be the total amount of time spent on this activity each shift.

Describe the duties that you undertake that require concentration. List the most important first.	How many shifts during the week	How long for on each shift*
For example checking detailed documents; carrying out calculations; analysing statistics; participating in hearings; operating machinery; driving; clinical coding; taking formal minutes of meetings; report writing; carrying out screening tests/microscope work, therapy, intricate clinical interventions; examining or assessing patients/clients; undergoing cross examination in court.		

14.2 Interruptions

If you are interrupted in the course of your work, describe the nature of the interruption and say whether you have to stop what you are doing to respond to the interruption and whether you have to re-prioritise your work as a result of it	How often each shift

Emotional effort

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

15.1 Please complete the table below, indicating whether you carry out the activities listed as examples

Examples	Yes/No	Number of occasions per week/month/year	Please describe, including the degree of involvement with the distressed/angry patient/client
15.1.1 Processing (e.g. typing/transmitting) news of highly distressing events	Yes No		
15.1.2 Providing a service for distressed/angry patients/clients/staff	Yes No		
15.1.3 Giving unwelcome news to patients/clients/carers/staff	Yes No		
15.1.4 Dealing with difficult situations/circumstances	Yes No		
15.1.5 Designated to provide emotional support to front line staff	Yes No		
15.1.6 Caring for the terminally ill	Yes No		
15.1.7 Providing a therapy service to emotionally demanding patients/clients/staff	Yes No		
15.1.8 Communicating life changing events to patients/clients/staff	Yes No		
15.1.9 Dealing with people with challenging behaviour	Yes No		
15.1.10 Arriving at the scene of a distressing incident	Yes No		
15.1.11 Other	Yes No		

Working conditions

This factor measures the demands arising from inevitably adverse environmental conditions (such as 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, carer).

16.1 Please describe where you work. If you work in more than one area, state the percentage of time in each

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16.2 Please complete the table below concerning the conditions in which you are required to work or illness/injury to which you are exposed

Are you required to use or are exposed to:	Yes/No	Frequency per week/month/year on average	Please describe the requirement
16.2.1 Using transport on a regular basis	Yes No		
16.2.2 Using road transport in emergency situations	Yes No		
16.2.3 Outdoor working	Yes No		
16.2.4 Using a computer/VDU for the majority of the shift	Yes No		
16.2.5 Extreme temperatures	Yes No		
16.2.6 Unpleasant smells or odours	Yes No		

Are you required to use or are exposed to:	Yes/No	Frequency per week/month/year on average	Please describe the requirement
16.2.7 Excessive noise or vibration	Yes No		
16.2.8 Dust or dirt	Yes No		
16.2.9 A humid atmosphere	Yes No		
16.2.10 Dangerous chemicals/ substances in containers	Yes No		
16.2.11 Aggressive verbal behaviour	Yes No		
16.2.12 Unpleasant substances/non household waste	Yes No		
16.2.13 Severe weather conditions	Yes No		
16.2.14 Noxious fumes	Yes No		
16.2.15 Infectious materials or foul linen	Yes No		

Are you required to use or are exposed to:	Yes/No	Frequency per week/month/year on average	Please describe the requirement
16.2.16 Fleas and lice	Yes No		
16.2.17 Bodily fluids, faeces, or vomit	Yes No		
16.2.18 Aggressive physical behaviour	Yes No		
16.2.19 Dangerous chemicals or substances that are not contained	Yes No		
16.2.20 Life threatening hazards	Yes No		
16.2.21 Other	Yes No		

Appendix: Additional guidance on factor 2 knowledge, training and experience

General points

Consider the main types of knowledge required for your work and state them under the most appropriate question heading, starting with the one that is the most central to your job (e.g. scientific knowledge for biochemists). Only list qualifications once, in the most relevant section (e.g. a nursing qualification in the clinical knowledge section).

Qualifications indicate that the level of knowledge required must be of an equivalent level to the stipulated qualification not that there is a requirement to hold any particular qualification. Training towards qualifications is a means of acquiring knowledge as is on-the-job training, short courses and practical experience. If a job does genuinely require the knowledge acquired through a specified formal qualification, then this should be recorded.

This factor measures the minimum knowledge required by a competent performer to do the job to the required standards. You may have different or higher qualifications than those required for the job, but these should not be included.

Where qualification and/or experience requirements for a job have changed over time, the current requirements should be entered. As it is the job that is evaluated, jobholders in post with previous qualifications are deemed to have achieved the current qualification level through on the job learning and experience. You may need to consult your line manager on the current qualification and/or experience requirements that are actually needed for your post.

A Person Specification may set out the qualifications and experience required, but you should bear in mind that it may understate the knowledge actually needed to carry out the job

because it is set at recruitment level on the expectation that the rest of the required knowledge will be acquired through on the job training and experience, for example, the person specifications for:

- Clerical posts typically state the recruitment level of knowledge as a number of GCSEs, whereas the actual knowledge requirement includes a range of clerical and administrative procedures.
- Managerial posts may state the recruitment level of knowledge as a number of GCSEs plus a specified period of health service experience, whereas the actual knowledge requirement includes the range of administrative procedures used by the team plus supervisory/managerial knowledge or experience.
- Healthcare jobs may state that a form of specialist knowledge is desirable, rather than essential, because the trust is willing to provide training in the particular specialist field.