NHS
Blood and Transplant

Additional Information Sheet (AIS)
For Job Evaluation Purposes

Post Title	
JD Ref (Office use only)	

Factor 1 – Communications

- Nature of communication ie verbal, written, email, telephone, presentation (numbers, how often, what communicating)
- Communication skills ie persuading, influencing, tact, diplomacy, negotiation
- Who they are communicating with ie team, internal NHSBT, external, individuals, groups
- Information communicated ie complex, sensitive, contentious with some examples

Factor 2 – KTE

- Admin, clinical, technical, managerial, specialist knowledge eg NHSBT specific, legal to be clear in PS and backed up with the detail in AIS
- Qualification in PS – be clear of the actual level eg accountancy qualifications ACC but what level is required. CIPD – part qualified diploma or masters level?
- Equivalencies eg what skills or knowledge are required to be degree equivalent in the role
- Detail of courses – internal or external needed for the role and confirmation of the duration and level of course
- CPD requirements
- Professional registration requirements

Factor 3 – Analytical & Judgemental

Measuring analytical skills to diagnose a problem and understand complex situations or information and judgemental skills to formulate solutions for recommendation/decisions

- Types of decisions postholder is responsible for
- Decisions postholder has involvement in
- How decisions are taken – what's needed for reference to support decision making?
- Conflicting opinions possible? If so, who makes the decision, is it postholder?
- Where there are gaps or missing data in decision making – who is responsible for the decision?
- What data is used and their sources.
- What support is available?

Factor 4 – Planning & Organisation

Measuring planning and organising requirements and complexity and uncertainty involved in these

- Planning of own time, time of others?
- What is the postholder planning?
- The impact of the planning ie across individual, team, department, directorate, NHSBT, externally etc?
- Timescale of plans – eg monthly, 6 monthly, annual, 3-5 five years
- Frequency and nature of changes to plans and how they are accommodated to adjust plans
- Staff rotas – how many staff, complexity of rota
- Project management?
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Factor 5 – Physical Skills

Takes into account hand-eye co-ordination, manipulation, requirements for driving and keyboard use

- Roles with lots of driving normally score at level 2 but this requirement needs to be clear in Person Specification.
- Standard keyboard scores at level 2 which is common in many NHSBT roles where it is clear that computer/VDU work is significant – skills can be learnt over time
- Advanced keyboard requires specific training which should be clearly detailed in the Person Specification.

Factor 6 – Patient / Client Care

Within NHSBT most posts score at level 1 for patient client care as this factor measures responsibilities for patient care, the postholders involvement in the care/treatment of patients and the degree to which the responsibility is shared with others. Management roles within NHSBT have the nature of their management responsibility for the patient care scored via other factor levels eg planning, policy and service development.

Posts to which this factor applies include those:
- with **direct** patient/client contact to provide advice or specific clinical/technical services
- with an essential clinical qualification confirmed in the person spec and specific responsibilities for patient care defined in the JD
- posts which directly manage the providers of patient/client care or a clinical technical service and who may or may not provide that service or advice themselves.

(Look at some posts with PCC scores and have some examples to hand)

Factor 7 – Policy & Service

Measuring development and implementation of policy and/or services, nature of responsibility, extent it is shared with others and impact of policy or service on function, department, directorate, NHSBT or wider.

Requirements for
- Commenting on policies? Examples?
- Proposing changes within area or beyond and if so, what areas, internal or external to NHSBT, directorate or department?
- Development of policy/service provision within area or beyond, shared responsibility?
- Implementation of policy/service provision, within area or beyond, shared responsibility?
- Impact of policies/procedures – across team, directorate, etc

Factor 8 - Financial / Physical

Measuring financial resources (cash, cheques, debit and credit, invoice payment, budgets, revenue, income generation) and physical assets (clinical, office and other equipment, tools and instruments: vehicles, plant and machinery, premises, fixtures and fittings, stocks and supplies)

- Are they a signatory – how much per month?
- Delegated budget holder – how much is the budget, expenditure per month?
- Budget holder responsibilities – how many budgets, value of each
- Budget setting responsibilities – own budget or others?, How many budgets/areas?
- I-Procurement responsibilities eg do they order, have responsibility for the authorisation of order, checking of invoice or payment of invoice etc. How much, how often?
- Stock security?
- Security of equipment used by others

Factor 9 – HR

Supervision and management of staff

Responsibilities for the day to day supervision of staff ? (Supervision – work allocation or checking, includes monitoring or supervision of one of more groups of staff employed by a contractor.)

Do you manage a group of staff, or department(s) of staff? How many staff?   Which departments do they manage – name and nature of work.
Confirm which HR responsibilities apply in the post:
- initial stages of grievance and discipline
- appraisal
- acting as appointment panel member
- ensure that appropriate training is delivered to staff
- review work performance and progress
- work allocation and checking
- management of sickness absence
- recruitment and selection decisions
- personal and career development
- departmental workload and allocation

Staff Training
- Do you train others?
- What is the training, how delivered, how often is it delivered?
- Do you advise others? What advice, how often?

Factor 10 – Information Resources

Measuring information resources (computerised or paper based) and information systems (hardware and software eg medical records)

Information production and storage for others
- Confirmation of whether postholder has to process data via: Word processing of clinical records, letters, documents or processing test results, statistics, etc complied **by others** with an indication of how regularly task carried out
- Requirement for taking and transcribing **formal** minutes. Formal = published to a wider audience and significant job responsibility at Board or Case Conference level/nature, not departmental meetings or processing minutes taken by others, indicate how regularly task is carried out.

Use of computer software for design, development or data manipulation
Requirement for:
- **creating** spreadsheets which include **formulas,** how often, what purpose?
- manipulating data using spreadsheets, databases or other software, how often, what purpose?

System design, operation and maintenance
Responsibility for:
- Maintaining information systems/installing software?
- Adapting, designing or development of information systems
- Operation of information systems as a **major job responsibility** (ie in job purpose)
- Confirmation of whether the responsibility if for part of a system, or the whole system and the impact of the information resource eg across Team, Department, Directorate, NHSBT or beyond into wider NHS, DH, etc.

Factor 11 – Research & Development

Measures informal and formal clinical or non-clinical research and development activities **underpinned by appropriate methodology and documentation**. Includes testing of clinical or non-clinical equipment.

Requirement for and confirmation of how often eg daily, weekly, monthly?

- Surveys
- Audits
- Participation in R&D, clinical trials or equipment testing led by others or yourself (specify as appropriate)
- Carrying out research/development work:
- which is part of formal research programme/not part of formal research programme (specify relevant
- Clinical trials
- Co-ordinating, initiating, implementing, developing or securing funding R&D activities? Nature of research or programme and how often?

Factor 12 – Freedom to Act

Measures accountability for actions and those of others, to use initiative and act independently: and the discretion available to take action.

- Is work checked on a regular or sample/random basis or assessed at agreed intervals eg monthly, quarterly.
- Is supervisor or manager generally close by or contactable or only available at certain times?
- Is guidance provided by colleagues/manager or others outside of the organisation?
- Describe areas of responsibility where post holder acts independently and those where advice or guidance is required.

Constraints, policies and procedures
- To what extent is the role governed by policies and procedures or SOPs which cannot be deviated from?
- How often can initiative be used in non-routine situations – examples
- Is role bound by broad professional standards only with significant discretion for the post holder
- What is level of responsibility for determining the interpretation/application or implementation of policies/professional standards and how much freedom to take action based on own interpretation

Factor 13 – Physical Effort

Measures nature, level, frequency and duration of physical effort.

- Are there requirements for lifting, pushing, pulling, bending, kneeling, crouching and stretching, crawling, climbing or working in physically cramped conditions, heights?
- Requirement for standing/sitting with limited movement, repetitive movements?

Factor 14 – Mental Effort

Measures nature, level, frequency and duration of mental effort required eg concentration, responding to unpredictable work patterns, interruptions and deadlines

- Describe the duties undertaken that require concentration, length of concentration, how often
- If you are interrupted in the course of the work, describe nature of concentration and whether this requires a change in priority, how often

Factor 15 – Emotional Effort

Measures nature, level, frequency and duration demands of the emotional effort required to undertake clinical or non-clinical duties that are considered distressing and/or emotionally demanding

- Examples of the types of distressing or emotional issues in the role, direct or indirect and frequency.

Factor 16 – Working Conditions

Measures demands from environmental conditions – despite health and safety controls

Does the post require?

- Using transport on a regular basis – which type, how often, how long?
- Using a computer or VDU for majority of shift?
- Exposure to extreme temperatures, unpleasant smells or odours, noise, dust/dirt, dangerous chemicals, aggressive verbal behaviour, infectious materials, bodily fluids, aggressive physical behaviour?