

Creating a Job Description, Person Specification and Additional Information Sheet - Manager Guidance

Introduction

The purpose of this guidance is to help you develop a Job Description (JD) a Person Specification (PS) and an Additional Information Sheet (AIS) that meets the requirements for both Job Evaluation (JE) and Recruitment.

When creating a new post (or amending an existing one) you must inform HR Direct at the earliest opportunity. HR Direct will then seek appropriate HR support to assist you.

It is critical that consistency across the organisation is maintained when developing/amending posts, so it is important that you allow sufficient time to write, revise and liaise with HR and other managers. This is essential if you have specific recruitment timelines that you want to achieve. For more details on the full job process and timescales see the Job Evaluation Flow Chart on People First.

How to draft the Job Description

Your role as the manager is to create a JD that is a true account of the role. the document should be clear and concise.

The JD and PS will form the outline of the recruitment profile which will be used for advertising.

When drafting a role for evaluation you will need the following documents from the Job Evaluation People First page:

- **Manager Top Tips** – this gives helpful advice to manager regarding the grading process and what they can do to assist
- **Job Description Template**
- **Person Specification Template**
- **Additional Information Sheet Template**

The following outlines the information that is required on the JD;

Post Details:

Title of Post: Ensure that the title of the post describes the job

Grade: Leave blank (for HR Consultant to indicate once they have analysed the role ahead of submission for formal grading)

Dept/Directorate: Put the Department and the Directorate names here e.g. Workforce Specialist Services – People.

Accountable to: State the post title of the line manager.

Org chart: A full organisational structure is required which will be used for both Job Evaluation and Recruitment. Ensure that you highlight the post within the structure and that the post title is the same on all documentation

Main Job Purpose: This must be a clear and concise statement, ideally a single paragraph that outlines the overall scope of the role.

Key Duties and Responsibilities: Any potential employee should be able to understand the requirements of the role and current employees should be able to recognise the job that they do from this section of the JD.

This section should be a list of the main duties of the post in a bullet point format.

The following points should be noted:

- Do not refer to acronyms or abbreviations without showing them in full the first time
- Do not refer to candidates requiring 'x' number of years' experience as this is considered discriminatory and is not a measure of a post holder's competence.

How to Draft the Person Specification

The Person Specification (PS) is used for short listing for Recruitment purposes and should therefore always indicate whether criteria are essential or desirable.

The essential criteria should be the minimum requirement necessary to carry out the job to a satisfactory level and the desirable criteria reflects a competent practitioner.

Managers should ensure employees who are recruited who meet the essential criteria only are fully supported to develop to the standard of a competent practitioner. It is important to note that candidates who do not meet the essential criteria cannot be shortlisted or appointed.

In order to prevent a delay in grading or recruiting to the post all sections of the PS should be completed when submitted for evaluation.

Personal Attributes that are not acceptable in a Person Specification

The following table shows examples of misleading or discriminatory criteria and alternative suggestions have been given.

Do Not Use	Reason	Suggested Alternative
Reference to number of years' experience e.g. Minimum 10 years Line Management experience	Ten years' experience would preclude those applicants that have not been available for employment for this length of time. Unless the length of experience is justified then this statement could have age discrimination implications.	Line Managers should instead record experience in terms of quality e.g. "experience of monitoring staff workload, setting objectives, performance management, appraisals, dealing with conflict, motivation, training" etc.
Possesses 3 GCSE's	This statement precludes potential applicants that have other 'equivalent' academic qualifications. Unless the statement is re-worded it could have race and age discrimination implications, i.e. the applicant may not have been brought up within an academic system that teaches GCSE's.	You should always state 'or' equivalent experience' and define what this would be. e.g. for supervisory roles this could be extensive experience of working independently and supervising others.
Good General Health	This statement is non-specific and open to different interpretation by the applicants and recruiting managers involved in the recruitment process. It could potentially discriminate against an individual who is declared Disabled but could carry out the role either with or without reasonable adjustments.	All posts are subject to pre-employment health checks by qualified professionals therefore it is not necessary or appropriate to include this in the person specification.
Smart appearance i.e. no long hair or earrings.	This statement could potentially discriminate against applicants who have a requirement within their culture or religion to wear long hair.	The statement should be removed or re-worded to confirm any specific dress code requirements.
Flexible in their approach to work	This statement is ambiguous because it could mean one of many things.	Concentrate instead on criteria that can be measured fairly and do not rely on subjective opinion e.g. the ability to adapt and respond to changing needs at short notice.
Can use Computers	Again this statement is ambiguous and open to interpretation. It's not clear for example if this is simply data input or knowledge of the full range of software packages.	Recruiting Managers should clarify the level of expertise applicants should possess, e.g. to demonstrate a certain degree of typing speed or be able to use certain software packages.
Reference to particular NHSBT/NHS systems	Knowledge or experience of internal systems such as QPULSE, HEMATOS etc should not be essential as this excludes external candidates.	References to these internal systems may be included as desirable criteria.
Experience of dealing with customers	This statement does not specify the level or quality of experience the applicant is expected to possess.	It should be expressed in specific terms e.g. experience of working within a particular sector of the community, dealing with people face to face, resolving complaints over the telephone etc.
Good Sense of Humour	This would not be measurable as each person's view of what is regarded 'Good Sense of Humour' is different. Also the need to have a sense of humour to carry out a particular role is questionable.	The statement should either be removed or re-worded in terms of the interpersonal or team building skills that are expected of the applicant.

How to draft and Additional Information Sheet

The Additional Information sheet gives you the opportunity to give detail behind key duties outlined in the JD. Providing additional information and examples of work/tasks undertaken give further understanding and clarity about the job role which will consequently assist with the Job Evaluation grading.

Along with this guidance, Your HR lead will help you to tailor this document to meet the requirements for job evaluation panels.

This document follows the NHS Job Evaluation 16 Factor format to assist with the evaluation process.

Try to make information clear and concise. Lengthily information can be difficult for panels to take in and can often lead to key information being overlooked.

Post Title: (Insert the role title here)

Use this section to expand on the Key Duties outlined in the Job Description (JD).

Give specific examples of duties to be undertaken under the appropriate headings.

Give details of any NHS/NHSBT specific systems/IT systems that the post holder will be expected to use.

Do not repeat wording used in the JD.

Before completing this document please contact your HR Consultant

Factor 1 – Communications

- Nature of communication i.e. verbal, written, email, telephone, presentation (numbers, how often, what communicating)
- Communication skills i.e. persuading, influencing, tact, diplomacy, negotiation
- Who they are communicating with i.e. team, internal NHSBT, external, individuals, large groups (if so, state the size and clarify if the communication is in a formal setting)
- Information communicated i.e. complex, sensitive, contentious, distressing with some examples

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

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

Factor 4 – Planning & Organisation

Measuring planning/organising requirements along with the complexity and uncertainty involved in these

- Planning of own time, time of others?

- What is the postholder planning?
- The impact of the planning i.e. across individual, team, department, directorate, NHSBT, externally etc?
- Timescale of plans – e.g. 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
- Does the post project manage? If so, provide details of this with regards to planning and complexity
- If the planning a broad range i.e., are they managing multiple plans/programmes of activity at once – give examples

Factor 5 – Physical Skills

Takes into account hand-eye co-ordination, manipulation, requirements for high-speed driving (e.g. blue light) and keyboard use

- 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 through indication of RSA/OCR or equivalent level of qualification as essential
- State whether fine tools and manipulation of machinery is required e.g. use of fine screw drivers or pipettes.
- Does the post holder perform venepuncture?

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 e.g. 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.

Factor 7 – Policy & Service

All NHSBT posts are presumed to follow policies and procedures.

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 e.g. do they order, have responsibility for the authorisation of order, checking of invoice or payment of invoice etc. How much, how often?
- Stock ordering?
- Security of equipment used by others

Factor 9 – HR**Supervision and management of staff**

Is the post holder responsible for the supervision of staff? (Supervision is work allocation or checking only) if so – provide details

Is the post holder a day-to-day manager of a group of staff? Day to day manager is responsible for all or most of the following:

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

Is the post holder a line manager with significant line management responsibilities below

- 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

Matrix Management

This applies to post holder who manages a select group of staff working on a specific project. They are not their full or day to day manager as they are managed by others outside of this specific project work.

Training

- Does the post train others in own discipline?
- What is the training, how delivered, how often is it delivered?
- Do they create training programmes and materials

HR Advice

Does the post provide basic HR advice or core HR Advice on multiple subjects

Are they responsible for delivering any HR services? If so, please provide details

Factor 10 – Information Resources

Measuring information resources (computerised or paper based) and information systems (hardware and software e.g. 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 compiled **by others** with an indication of how regularly task carried out
- Requirement for taking and transcribing **formal** minutes. Formal means 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** (i.e. in job purpose)
- Confirmation of whether the responsibility is for part of a system, or the whole system and the impact of the information resource e.g. 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 e.g. 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?
- Please note horizon scanning is not classed as formal R&D activity & methodology in the JE scheme

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 e.g. monthly, quarterly.

- Is post managed or is post supervised
- Is 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 post holder bound by broad professional standards only with significant discretion for the post holder
- What is the 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? e.g. regular driving?
- Using transport on a regular basis – which type, how often, how long?

Factor 14 – Mental Effort

Measures nature, level, frequency and duration of mental effort required e.g. 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
- The nature of the role should depict the concentration. i.e. a receptionist would not exercise regular prolonged concentration as the nature of the job would require regular interruptions via phones call and patients.

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.
- if the post holder manages staff, then please state this under this factor as they will be exposed to emotional pressures from staffing issues.

Factor 16 – Working Conditions

Measures demands from environmental conditions – despite health and safety controls

Does the post require:

- 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?