

HR Guidance: Writing an effective Job Description and Person Specification

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1.0 Introduction

The key to attracting and recruiting the right people are clear, realistic and well written job descriptions & Person Specification (JD/PS).

This guidance has been developed to support managers to draft high quality job descriptions and person specifications, which will be under an agenda for change pay band. The job description and person specification should be drafted using the template job description and person specification provided.

The purpose of this guidance is to:

- Ensure job descriptions are prepared with sufficient information to enable the HR team and Staffside carry out a robust job evaluation process in accordance with the national guidance
- Attract and/or appoint the most suitable individual that meets the requirements of the role
- Ensure consistency, fairness and equity across the ICB
- Provide a basis for good induction, supervision and development of staff
- Ensure professional or statutory requirements are detailed clearly
- Ensure job descriptions and person specifications meet employment law requirements.

2.0 Writing Job Descriptions

When writing a job description, it is important to include comprehensive and detailed information about tasks and responsibilities to ensure the JD/PS is of a high standard. This is done through:

- Gathering feedback from colleague within the team/organisation (where applicable)
- Reviewing the contribution of the post to service delivery
- Focus on outcome of tasks
- Identify areas of direct or indirect accountabilities
- Considering the future direction of the service, the skill mix needed and operational considerations
- Testing assumptions/perceptions about role, responsibilities and tasks
- Considering professional competence frameworks where available and looking at what is included in similar roles in the ICB or other organisations
- Listing job duties that reflect the position requirements and ensure they are not based upon the capabilities of any one individual.

The template job description details the information that should be considered within each relevant section of a job description and person specification.

Appendix 1 of this guidance has some useful starting questions for managers to consider when developing a job description and person specification.

3.0 Agenda for Change Job Evaluation Factors

Agenda for Change factors are grouped into two sections; 'core factors' are levels which must be met in order for the role to match the specific level within a national profile the post is being considered to

be matched against; 'variable' factors are those where the factor level can be variable to that of the national profile.

The two most heavily weighted factors under Agenda for Change are 'Knowledge, Training and Experience' and 'Freedom to Act'. A role must meet the required level at each band for both factors in order to be assessed at that level.

There are sixteen factors which Job Descriptions and Person Specifications are measured against to determine their correct banding. These factors are listed in the table below.

Please note that it is important to provide sufficient information under each factor, and use the correct factor headings, in order to accurately and successfully determine the banding of the post through the job evaluation process.

Factor	Description
<p>Knowledge, Training and Experience (Core Factor)</p>	<p>This factor relates to the level of qualifications, experience and skills required to undertake the role. The factor level definitions are written in terms of the knowledge actually required to perform the job at each level. This is to ensure that the knowledge is accurately evaluated and no indirect discrimination occurs through use of qualifications, which may understate or overstate the knowledge required.</p> <p>Qualifications can provide a useful indicator of the level of knowledge required. Training towards qualifications is also one means of acquiring the knowledge required for a job (other means include on-the-job training, short courses and experience).</p> <p>This does not mean that there is a requirement to hold any particular qualification for a job to be scored at the level in question, but that the knowledge required must be of an equivalent level to the stipulated qualification. On the other hand, if a job does genuinely require the knowledge acquired through a specified formal qualification, then this should be taken into account when assessing the job.</p>
<p>Freedom to Act (Core Factor)</p>	<p>This factor relates to the level of independence and supervision the role will have. Ranging from:</p> <ul style="list-style-type: none"> • The role will be fairly closely supervised; the post-holder will work to defined departmental standards/policies but will have manager or supervisor present to refer to most or all of the time. • Person is expected to take the autonomous lead for own project, area or specialism, working within broad occupational policies. • Post-holder has significant responsibility and accountability for own work area and leads independently on this. Takes guidance from corporate or national policies and guidelines rather than manager. • Highest level of autonomy within the organisation; has overall corporate accountability for own department, Reports directly into executive director.

<p>Communication and Relationship Skills</p>	<p>This relates to the type of information the post-holder will be expected to communicate; its complexity and sensitivity, and also to the intended audience (their level of understanding, and any hostility the post-holder may face) and how frequent is this expected to be?</p> <p>It takes account of the skills required to motivate, negotiate, persuade, make presentations, train others, empathise, communicate unpleasant news sensitively and provide counselling and reassurance. It also takes account of difficulties involved in exercising these skills.</p>
<p>Analysis and Judgement Skills</p>	<p>This factor relates to the analytical skills needed (including the complexity of data or situations to be analysed) and the type of judgement the post-holder will need to make. This can range from:</p> <ul style="list-style-type: none"> • Post-holder makes straight-forward decisions where there is a single solution independently • Post-holder undertakes complex analysis and problem solving; they may be required to analyse large sets of numerical or technical data and make recommendations and decisions accordingly. • Post-holder is expected to be confident working with the most highly complex data used in their field, and be an expert who is able to analyse data and make recommendations without needing to consult with a manager. • The post holder will be able to identify risks, anticipate issues and find solutions
<p>Planning and Organisational Skills</p>	<p>This factor relates to the planning skills required in order to undertake the role; this factor relates to service planning in both the immediate and medium-long term, and takes account of the degree of complexity and uncertainty the post-holder works within. This can be:</p> <ul style="list-style-type: none"> • No particular planning/organisational skills required beyond ability to organise own work • Post-holder will organise and plan a broad range of activities and projects, many of which require careful planning and frequent adjustment of plans; <p>Will have responsibility for the long-term strategic plans for their area. They will develop business strategy, plan to mitigate risks, and may deal with high levels of uncertainty and often need to reformulate plans.</p>
<p>Responsibility for Patient/Client Care</p>	<p>Some staff within the ICB may not provide direct patient care, however it is important to stipulate that where staff are making recommendations or reviewing patient pathways this can also contribute to this factor</p> <ul style="list-style-type: none"> • includes devising care plans <p>Demonstrates previous experience to the team providing an escalation point where there are challenges to patient care, discharge or admission. Ensure ongoing issues are tracked and escalated</p>

<p>Policy and Service Development</p>	<p>This factor describes the level of influence and accountability the post-holder will have in relation to the development and implementation of policy, and on the overall service in which they work. Ranging from :</p> <ul style="list-style-type: none"> • No policy writing requirements or responsibilities; post-holder simply follows policies given to them. • Proactively ensures policies are implemented and improvements made within their own work area. They may also have some responsibility for developing and existing policy within their own work areas; e.g. suggesting ideas for how policy can be improved or changes to protocols that should be made. • Post-holder will take lead within their own area of expertise, writing and implement policies and protocols from scratch, or lead on a particular service improvement area. These will typically have an impact across and beyond the organisation and will involve liaison with other stakeholders • Have overarching responsibility for all policy development, associated governance and all service development associated with that service. <p>Corporate or board level responsibility for own area or service; employee is directly accountable to the board or executive team for their service's policy and performance.</p>
<p>Financial Responsibility</p>	<ul style="list-style-type: none"> • This factor relates to the responsibility the person hold for budgets and physical assets belonging to the organisation. • No financial or budgetary responsibilities • Medium responsibilities; authorised signatory from a budget, for (e.g.) staff expenses, small cash payments (but not general budget-holder although may hold small delegated budget personally) • Post-holder has own budget(for own department or service), AND/OR; is responsible for budget-setting for a department • Post-holder holds multiple budgets/services <p>Corporate or board level responsibility for financial performance and budgetary control in own area or service;</p>
<p>HR Responsibility</p>	<p>This refers to the responsibility in relation to line management and/or training of others held by the individual. The level can range from:</p> <ul style="list-style-type: none"> • No particular HR responsibilities; post-holder may be asked to demonstrate their duties to new or less experienced colleagues but will not have sole responsibility for training them. • Post-holder will line manage staff on a 'day to day' basis, including recruitment, work allocation, supervision, basic performance management • Provide specialist training in their own areas on a regular basis. • Post-holder will be line manager for own team/department, including full range of HR responsibilities • Head of Service or department and therefore have multiple teams of staff to line manage. Typically post-holder will have authority to dismiss and may sit on disciplinary and grievance panels.

Information Resources	This factor relates to the level of responsibility the post-holder has for the storage and management of information, and for developing systems to do so.
Physical Skills	This factor measures the level of physical skills. Most staff will have Standard keyboard skills however some role e.g. P.A.s and administrators, may be required to have advanced keyboard skills, e.g. RSA Level 3. Please note this in your Person Specification.
Research and Development responsibilities	This looks at the frequency and the level of research and audits the post holder carried it could be regular or occasionally. This includes: <ul style="list-style-type: none"> • Online and other types of surveys, audits, investigations • Monitoring and developing significant and analytical trends, plus key performance indicators
Physical Effort	The expectation that staff most staff in the ICB will have light effort unless they are required to move equipment around or heavy loads
Mental Effort	This factor is based all around the level of concentration and frequency of interruptions and requirement to change what the post holder is doing to action other tasks e.g. Frequent requirement for prolonged concentration on tasks (e.g. producing and reading statistical reports or inputting data onto a system, and attending meetings at senior level); workload is predictable OR Occasional requirement for prolonged concentration; workload in unpredictable
Emotional Effort	This factor is are determined by frequency and exposure to distressing circumstances e.g. imparting unwelcome news of service closures to stakeholders; conduct, disciplinary issues and performance managing staff
Working Conditions	All ICB staff will automatically achieve a level 2 for this factor as we all use a PC/laptop for the majority of the working day

Appendix 1

Useful Information/Questions to consider when writing Job Descriptions

- A good job description is needed for a robust job matching outcome, which should clearly articulate the requirements and competence for the role and a person specification stipulating the essential qualifications and/or experience required to be employed in the role
- Use the checklist below to draw up the list of duties (not all questions will be applicable to all posts). Start with the elements which take up most of the post holder's time. It is helpful to distinguish between regular, intermittent, and emergency duties.
- Use active verbs, like 'writing', 'repairing', presenting and 'calculating', instead of vague terms like 'dealing with', 'in charge of':
- Does the post holder have to deal with people at different levels? If so, then Who? How often? In what way (e.g. letters/memos/telephone/in person/at public meetings) To do what (e.g. persuade/negotiate/instruct/give information/request information/act as receptionist)?
- Does the post holder have to do written work? If so then What? How often? At what level (e.g. timesheets/memos/office records/notes of meetings/committee papers/publicity materials/advertisements/business cases/prepare presentations)?
- What type of contact is there with stakeholders, what is the nature of contact and relationship?
- Is there any patient care provided and where e.g. in clinics or over the telephone? Is there responsibility for designing care programmes and do these cut across other healthcare disciplines?
- Does the post holder have responsibility for resources (money, equipment)? What? How much? What level of responsibility (e.g. own tools/petty cash/office stocks/section's budget/valuable/maintenance equipment/vehicles/departmental budget)? Does the post holder administer, monitor, or set budgets?
- What staff management responsibilities does the post holder have (e.g. training/staff development/discipline and grievance/equal opportunities/setting work/monitoring results)?
- Are there deputising responsibilities? If so then for whom? How often? What does this involve?
- Are planning responsibilities involved? What (work/budgets)? On behalf of how many people? Are the plans long term or short term and do the plans impact other department or services.
- What is the post holder's responsibility or involvement in research? If they do participate in research, how often, ad hoc or regularly undertakes it.
- Are there any miscellaneous activities and if so what are they? (e.g. unsociable hours/occasional meetings outside office hours/on-call rota/sickness cover, holding a bleep)?

Appendix 2: Useful information/questions to consider when writing Person Specifications

- The person specification concisely defines the qualities and knowledge job holders need to possess to carry out duties competently.
- The person specification's main purposes are to:
 - Form the basis of the job advertisement, short listing and structured interview
 - Be clear on what qualifications are required (by law and the ICB)
 - Facilitate the objective assessment of candidates
 - Allow candidates to assess their own suitability for a post
 - Provide equality of opportunity and demonstrate appropriate and fair recruitment practice
- Criteria must be job related, necessary for effective performance, non-discriminatory, reasonable and justifiable and must not include criteria which current post holders are not demonstrating or undertaking if there have been no changes to the job.
- Understating the attributes required for a post may lead to appointments where staff are unable to fulfil all the job requirements. Overstating attributes may result in disappointment if there are no ideal candidates or dissatisfaction by an overqualified person who is appointed and whose talents are underutilised. Unnecessary requirements can lead to claims of indirect discrimination.
- It is important that person specifications are clearly understood and do not discriminate against any individual or group. These forms may be needed as evidence in an Employment Tribunal or if a decision is challenged by an employee or their representatives.

Suggestions for how to start drawing up a Person Specification:

- From the job description pick out the duties, and try grouping similar ones.
- Translate duties into the abilities and skills needed; specify necessary skills in precise job-related terms.
- Criteria should be ranked to show order of importance and essential and minor requirements should be clearly distinguished.
- Do not state the number of years' experience expected, instead state what skills/experience you would expect the post holder to have in that time. If you can justify certain skills would only be achieved after so many years only then can they be included. E.g. some finance experience would only be gained from seeing through a full financial year.
- **Essential** defines the minimum criteria needed to carry out the job and the job cannot be done without these.
- Only the criteria needed to perform the duties should be included.
- The stated level of qualifications, experience, knowledge should be that which would be required if the post were to be advertised, not what an existing post holder has if different, e.g. "excellent keyboard skills" when "good keyboard skills" would be sufficient.

- Generalised statements such as “requires extensive experience” should be avoided; if experience is essential, this section should describe the elements of experience and type of experience required i.e. experience of leading complex projects
- As far as possible all criteria should be capable of being tested objectively - subjective or irrelevant criteria must be avoided - e.g. personality traits
- Attributes such as “leadership skills” must be defined in terms of the measurable skills and qualities that contribute to it so they can be assessed