

A guide to writing and updating job descriptions

Overview

This guidance combined with the separate information on developing a person specification is intended to assist GHP members (*and their managers*) and matching panels in the process of transferring NHS pharmacists from Whitley pay scales to the new pay structure. Every organisation will have its own format and possible support documentation so any advice can only deal with the broad principles. When undergoing this process it is important to remember that the first purpose of a job description is to describe the job to be undertaken and the person specification describes the essential and desirable qualities of a successful candidate. Whilst they should not be a procedural account of how to do everything they should be detailed enough to provide an outline of the duties and responsibilities of the post.

Every job in the health service will be evaluated using the new job evaluation factor plan except doctors and dentists, although it was tested against medical posts in the testing phase. The outcome of that evaluation will place people in the appropriate pay band. Matching panels in line with the partnership fundamentals of Agenda for Change will consist of 3-5 members although usually it is two staff members and two management members. They evaluate jobs with the use of job *and person specifications* descriptions, and where clarification is still needed interviewing post holders, in order to decide in the first instance whether the post can be matched with an existing profile.

Under Agenda for Change roll-out it can be seen that job descriptions will play an important part in the job matching and job evaluation process. Accurate and concise job descriptions will assist the job matching process and help minimise delays when staff are moved onto the new pay bands. It is therefore important that job descriptions are up to date and accurately reflect the role being undertaken. The first *task* therefore is to ensure that your job descriptions are up to date and valid, so this guidance includes suggestions about how to update your job description and how to ensure that the matching panels can easily see at which level of each factor the post *fits*. A glossary of terms is in the appendix A. The updated agreed profiles for all pharmacists are accessible via this website.

Profiles work on the premise that posts in the NHS are fairly standard with common features relating to knowledge needed, responsibilities undertaken and effort and working conditions required. There is within healthcare a hierarchy of knowledge and skills and working conditions and by using a “weighted system” this hierarchy is translated into a graduated range of levels with associated scores across the 16 factors. For example the entry knowledge level required increases from ATO to technician and to pharmacist and this is reflected in the levels or scores achieved. Please note experience has shown current job titles are not a good indicator of how a post evaluates. For example try to define the role of a job titled “Senior Pharmacist” and then try to assign a Whitley grade from A to H!!!

Similarly you should not assume that everyone on a specific Whitley grade will be assigned to the same new pay band as profiles do not correlate to the “old” Whitley grades as with time and recruitment pressures Whitley grades no longer always reflect the duties undertaken. An

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important point that cannot be stressed enough is that it is the job and not the person that is matched so it is the knowledge & skills, responsibilities and working conditions required of the post not those held by the individual.

Most responsibilities that are management related are hierarchical for example you will not usually have more finance or people responsibilities than your manager and a similar reverse situation happens with those that report to you. Remember that all staff in the NHS are covered by the JE system including those excluded from AfC so the top scores for Finance are likely to be held by the Director of Finance !!!

Background to Matching

Under AfC posts will be banded according to the levels and sum of scores on 16 factors. Each pharmacy profile gives a level or range of levels for each factor. For a post to match a profile five conditions must be met: -

1. there must be a perfect match on factor 2, knowledge, and factor 12, freedom to act
2. the level assigned to any specific factor must vary by no more than ± 1 level beyond the specified range for the factor on the profile. For example, if for the **R&D** factor the range on a particular profile is 2-3, the post could still match the profile if the actual level assigned is in the range 1-4, but could not match if the level is above 4;
3. there will be a no match if more of the remaining factors vary by more than ± 1 point;
4. the overall score for the post must not take it outside of the banding for the profile. For example, for a post to be matched to the Highly Specialist profile the score assigned to the post must be within the bands 8a/b. If the score takes the post above 8b, then it cannot be matched to the profile.

If a post cannot be matched to a particular profile it would need to be individually evaluated, but we expect that this will be a rare event. (Please also see the section on Hybrid matching in Job Evaluation Scheme)

What are job descriptions?

Job descriptions describe an employee's role, what is required to do the job and not how they do it or their personal contribution. Accurate job descriptions provide the basic building blocks on which the recruitment process is built. They act as:

1. A tool in recruitment - to assist in the writing of job advertisements.
2. A tool in selection - to help make decisions about who to employ
3. A basis of employment contracts- frequently employers make reference to the job description in their contracts of employment.
4. As part of an employer's defence in cases of unfair discrimination.
5. As a means by which the employer's expectations, priorities and values are communicated to new members of staff.

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In most cases they will include some kind of generic statement indicating that the jobholder from time to time may carry out other duties

However before we look at basic rules of devising a job description. There is one rule for you the member. To use this guidance it will be essential for you to have a copy of each profile and a copy of the latest Job Evaluation Factor Plan. If you are well versed in Job Evaluation or you or your colleagues have taken our advice and are trained matchers you can ignore the background information on the process and the detail on the factor levels.

Agreeing New Job Descriptions and Person Specifications

It is essential that your job description *and person specification* are up-to-date for this process of assimilation. It is better to review existing job descriptions that start with a blank sheet of paper. Job descriptions should reflect what you do and should be agreed with your line manager. ***Your job description requires your agreement.*** It is important that you use clear language to help the matching panel to understand the requirements of your job. **Only job descriptions agreed with the post holder should be evaluated by the matching panels.**

For those updating their job descriptions *and person specification* it is important to read the factor plan first, including the headline definitions and the notes at the end. While it may seem obvious which profile is appropriate from your point of view, take a look at the profile above and below the one that you expect to be matched with for comparison purposes.

Clustering

It would be impossible to individually match over 1 million posts so where there is agreed commonality between postholders then the “family” of jobs is clustered and collectively matched using a generic or typical job description and person specification. The “family” appoint a representative postholder and the role of this postholder is to attend a matching panel accompanied by their manager to provide this additional information if required about the post under review. In simple terms to explain and describe the various factors in practice and “paint a picture” of the job undertaken

Please note: Staff should not be pressurised to be in a cluster i.e. they are unhappy about it for any reason they can agree their own job description. There should be staff-side consultation and agreement regarding decisions about clustering of job descriptions. Job descriptions should be clustered together only if they are sufficiently similar in terms of the person specification and the content of the job description. Job descriptions should not be automatically clustered together on the basis of current Whitley grades/spine points.

Prior to job descriptions going to matching panels, all individuals in a cluster should receive the following information:

A copy of the job description that will be going forward to the matching panel as representative of their job description.

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The name of the person whose job description will be going to the matching panel and who will therefore be representing them at a matching panel interview.

Prior to the matching panels, all members of a cluster should have sufficient time (at least two weeks before the matching panel meets) to:

Consider whether they are satisfied that the job description going forward as representative of their job description is sufficiently similar to their own job description.

Consider whether they are satisfied to be represented by the cluster representative.

Consult their AFC representative for advice.

Contact the cluster representative to highlight any aspects of the job description they would like highlighted in the matching panel interview.

The matching process

Posts will be matched by panels will not include pharmacists so job descriptions and person specifications need to be exhaustive and include information that might seem obvious to pharmacists, e.g. the need for a Vocational masters qualification rather than Degree in Pharmacy. In some trusts, post holders and their manager may be invited to interview with matching panels to elaborate on points in their job description.

NB If attending a panel be honest and truthful about the role and do not oversell but do not assume the panel knows anything about pharmacy, so be prepared to explain simple things and avoid pharmacy language – e.g. Ward Pharmacy may be interpreted as top-up (now there's another one, it's not easy). It is a good idea to sit with the "family or cluster members" and prepare notes prior to the meeting that address the likely questions

Job Assessment Questionnaire

It is worth getting a copy of this from the DH website and having a look at it to give you more insight into the detailed information that is required to develop the national profiles and/or to locally evaluate a post.

Grand parenting

Person specifications are for the post, not the person. For example the current required qualification for a pharmacist is at Masters level and this must be stated in the person specification. Individuals who qualified previously with a BSc will be automatically matched to the appropriate profile by virtue of a grand parenting agreement.

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Writing and updating a job description

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Individuals are best to start with their existing job descriptions and determine how current and accurate their status. It is claimed good HR practice ensures that job descriptions and person specifications are constantly updated the reality is likely to be the longer you have been in post the more outdated the paperwork !!

Job descriptions should be clear, concise, and accurate. They should be accessible for all staff. It is useful to make explicit the implications for jobholders of other human resource policies. For example compliance with the organisation equal opportunities policy. When starting the review consider what is essential and desirable for the job role. Prior to commencing the updating process it is worth “brainstorming” the duties involved in the post then prioritizing them in terms of most important and/or time-consuming.

The following categories may be useful when identifying tasks, duties and responsibilities:

- Autonomy - what level?
- Communication - who/how/what?
- Computer literacy?
- Counselling skills - who? what?
- Clinical skills - what?
- Leadership skills - what?
- Management skills - what? - Organising? Planning etc?
- Human resources – Supervising teaching and training what and who?
- Research – When How often what?
- Finance – Involvement in what when and how responsible?
- Negotiating skills - to do what?
- Qualifications - required for the role, not what you may have?
- Relevant experience

Whilst the information **should not** be written in the language of the Job Evaluation it is useful to look at the handbook, the profiles and factor level definitions. Where appropriate ensure the levels are covered using pharmacy language that is broad enough to be understood by someone outside pharmacy E.g. communication factor – will be based on advice to patients on medication and associated side effects, advising doctors on treatment choices where that advice may be challenged.

Note a number of the factors grouped under responsibilities and freedom to act are hierarchical and thus the example will vary with managerial responsibility.

The typical headings to consider are:

- a. Job title** - should indicate as clearly as possible the function in which the job is carried out and the level of the job within that function
- b. Main location** - where the job will be based.
- c. Reporting to** - the job title of the manager or supervisor to whom the jobholder is directly responsible.
- d. Reporting to jobholder** - the job titles of the posts directly reporting to the jobholder.
- e. Summarise overall purpose** - describe as concisely as possible the overall purpose of the job. The aim should be to convey a broad picture of the job, which will clearly distinguish it from

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other jobs and establish the role of the jobholders and the contribution they should make towards achieving the objectives of the organisation. When preparing the job description, it is often best to defer writing down definition of overall responsibilities until the activities have been analysed and described.

f. Principal job duties or main tasks - these should cover the following areas:

1. Identify and produce an initial list of main activities or tasks carried out by the jobholder
2. Analyse the initial list of tasks and group them together, so that ideally no more than about ten main activity areas remain. Most jobs can be analysed into seven or eight areas and if the number is extended much beyond that, the job description will become over complex and it will be difficult to be specific about accountabilities or tasks. Some organisations may facilitate this by using an additional form to determine effort and environmental factors.

3. Define each activity as a statement of accountability, i.e. what the job holder is expected to achieve (outputs). The emphasis should be on 'what gets done' rather than 'what workers do' as this provides a far more effective description and gives less room for ambiguity. Give a more precise meaning to the activity being described by using terms such 'communicates with', 'explains', 'clarifies', 'discusses' or 'inform'. If your role is to communicate with medical staff then you need to be clear as to why you do this

Is it to assist them treat patients?

Is it to correct and modify therapy?

Is it to agree corporate treatment plans in a specialist area?

Obviously it will depend on your role and organisation.

4. Define who the jobholder is accountable to in one sentence:

- Start with a positive indication of what has to be; for example: plans, prepares, produces, implements processes, provides, schedules, completes, dispatches, maintains, liaises with, collaborates with etc.
- Describe what is done as succinctly as possible
- State briefly the purpose of the activity in terms of outputs or standards to be achieved.

Each item in the job description should relate to 'outputs' that the jobholder will be expected to achieve or produce, and that each should therefore state what the jobholder can be held responsible for. Where a job task is performed under supervision, this should be clearly stated. Any deadlines to work to should be included, or at least acknowledged in the job description. Consider using the following categories. Look at each desirable and essential and expand the content. For example:

Management

Does your role:

- Influence policy and procedures - locally, trust wide?
- Involve analysing and responding to situations? At what level, locally, trust wide?
- Require budgetary responsibility? - To what level - i.e. complete responsibility or signatory?
- Require you to business plan?
- Involve planning shift rotas and allocating staff on a regular basis?
- Involve recruitment?
- Require you to be responsible for a group of staff and or clients/patients? Is this continuous or shift work related?
- Require risk assessments?

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- Require a level of responsibility regarding Health and Safety - what is it?
- Involve using HR policies i.e. investigating disciplinary, grievance etc?

Leadership

Apart from yourself, who are you accountable to? Consider an organisational chart.

Does your role require you to;

- be a team leader? What does this entail?
- be in charge of your area?
- manage your own caseload - how large?
- performance manage and formulate personal development plans? For whom?
- influence/make and implement changes too clinical practice, locally or trust wide?

Clinical

What skills are required to undertake the role (should be in person specification) ?

What responsibilities do you hold in assessing/planning/implementing and evaluating patient/client care - supervised or unsupervised?

Does your role require you to;

- work under supervision?
- refer to other disciplines/professions unsupervised?
- advise and recommend treatment (final say)?
- accept referrals from other disciplines unsupervised?
- manipulate instruments? How much skill is needed?
- manually handle patients/heavy objects? Is this a regular/constant feature of the role?
- be exposed to hazardous/biological substance - frequency?

Research

Does your role require you to;

- undertake research and audit?
- participate in research?
- organise clinical trials?

Education & Experience

- What qualifications are required to undertake the role (should be in person specification)?
- Are you expected to undertake further educational qualifications?
- Do your qualifications require registration E.g. Supplementary prescribing ?

Remember that the Agenda for Change Job Evaluation scheme measures what qualifications are required to do the job. If you have a qualification not actually required to do the job it doesn't count

What sort of experience does the role require, for example, would you have had to work in the particular speciality? It is likely that a Band 7 post will require 3-5 years experience and a Band 8 post a minimum of 6-7 years.

What sort of experience required by the job could be transferred/transferable from another job.

Training

Does your role require you to;

- train staff - who?
- mentor/facilitate staff and their development?
- facilitate courses, study days?

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- lead on any in-house forums related to your role
- under go mandatory training - what?
- train patients/clients/carers/relatives?
- undertake health promotion?

Communication

- Who are you expected to interact with on a regular basis, (key working relationships), social services, relatives, patients, clients?
- Are there special needs/requirements to ensure communication effective - challenging behaviour, learning disabilities, and bereavement?
- Does your role require you to discuss complex issues - planning care, advising others regarding management of care?
- Do you participate in Case conferences?
- What type of records must you maintain?

h. Reference to other documents (such as collective agreements)

- i. Review date** - Where the job description is explicitly incorporated into the contract of employment, it is also wise to state that the content and reporting arrangements may be reviewed and subsequently changed.

APPENDIX A - Glossary of terms

A4C	Agenda for Change - The proposed new terms and conditions. The job evaluation scheme. The knowledge and skills framework being proposed for adoption across the whole of the NHS after October 2004. (See DOH website http://www.dh.gov.uk/Home/fs/en)
J.D.	Job Description - A statement of all the elements of the work carried out or expected of the postholder. Pragmatically all the work that has been done in the last year and can be reasonably expected to be undertaken under a postholders contract.
Person Spec	The Person Specification - A statement usually drawn up to identify suitable candidates for a post and describing attributes and competencies required. This statement will be used in the job evaluation and matching process and should be agreed with managers.
Pay Band	The range of pay points in each part of the new pay scale defined by profile matching.
Job Profile	A generic statement of work based upon the factor plan and it's levels that identifies as skills and competence level for each job.
Matching	The comparison of J.D.'s and P.Specs with the generic profiles to establish on which pay band a job best fits.
Clustering	A practice of management and staff in partnership of grouping similar jobs, JD's and P.Specs to aid the matching process. This process is subject to agreement by the post holder.
JAQ	Job Assessment Questionnaire - A detailed questionnaire used by job evaluators to gather information to fit details of job to factors and levels before matching to a profile or to be used to draw up a new profile where no match is possible.
J.E. Factors	Sixteen dimensions that allow description of work and responsibility which are broken into ascending levels. (See JE handbook for detailed definitions on the DOH website).
J.E. Levels	A subdivision of job evaluation factors which relates to details of jobs and responsibilities. (See above)
Assignment	Assignment of a post to a pay band. The process of finding the new pay point in the new pay scale for a given post by using the matching process.
Supervision	A term specific to the job evaluation scheme meaning the most intensive level of management or continuous surveillance in the range of management observation of a post holders work.
Shadow Executive	The authority of staff side unions and management that defines and determines the application of the job evaluation scheme.
Staff Council	The organisational body which will take on the administration of the new terms and conditions and pay system once Whitley Council passes on this responsibility in 2005.

APPENDIX B

The Factor Definitions

Factor 1 – 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, train others, empathise, communicate unpleasant news sensitively and provide counselling and re-assurance. It also takes account of difficulties involved in exercising these skills.*

Factor 2 – Knowledge, Training and Experience *These factors measure all the forms of knowledge required to fulfil the job responsibilities satisfactorily. This includes theoretical and practical knowledge; professional, specialist or technical knowledge; and knowledge of the policies, practices and procedures associated with the job. It takes account of the educational level normally expected as well as the equivalent level of knowledge gained without undertaking a formal course of study; and the practical experience required to fulfil the job responsibilities and satisfactorily.*

*The panel is interested in the minimum qualification and/or experience required for a **new person** coming into the post. This means what is actually needed to undertake the post not what you have. Thus minimum qualification for a pharmacist is the **current educational standard** of a 4 year Vocational Masters degree with one years postgraduate competency assessment with examination to enter the register.*

Note

1. Most panels feel comfortable with following the outline in the profile so it may be useful to outline not only the qualifications, training and experience required to undertake the post in the job description but obviously also in the person specification.
2. The Evaluation Scheme recognises that healthcare is a knowledge based service and this one factor is highly weighted (24% of total) so that it largely determines the outcome.

Factor 3 – Analytical and Judgmental Skills *These factors measure the analytical and judgmental skills required to fulfil the job responsibilities satisfactorily. It takes account of requirements for analytical skills to diagnose a problem or illness and understand complex situations or information; and judgmental skills to formulate solutions and recommend/decide on the best course of action/treatment.*

Factor 4 – Planning and Organisational Skills *This factor measures the planning and organisational skills required to fulfil the job responsibilities satisfactorily. It takes account of the skills required for activities such as planning or organising clinical or non-clinical services, departments, rotas, meetings conferences and for strategic planning. It also takes account of the complexity and degree of uncertainty involved in these activities.*

Factor 5 – 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, taste, smell), dexterity, manipulation, requirements for speed and accuracy, keyboard and driving skills.*

Factor 6 – Responsibilities for Patient/Client Care

This factor measures responsibilities for patient/client care, treatment and therapy. It takes account of the nature of the responsibility and the level of the jobholder's involvement in the provision of care or treatment to patients/clients, including the degree to which the responsibility is shared with others. It also takes account of the responsibility to record care/treatment/advice/tests.

Factor 7 – Responsibility for Policy or Service Development *This factor measures the responsibilities of the job for development and implementation of policy and/or services. It takes account of 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.*

Factor 8 – Responsibilities for Financial and Physical Resources *This factor measures the responsibilities of the job for financial resources (including cash, vouchers, cheques, debits and credits, invoice payment, budgets, revenues, income generation); and physical assets (including clinical, office and other equipment; tools and*

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instruments; vehicles, plant and machinery; premises, fittings and fixtures; personal possessions of patients/clients or others; goods, produce, stocks and supplies).

It takes account of the nature of the responsibility (for example, careful use, security, maintenance, budgetary and ordering responsibilities); the frequency with which it is exercised; the value of the resources; and the degree to which the responsibility is shared with others.

Factor 9 – Responsibilities for Human Resources (HR) *This factor measures the responsibilities of the job for management, supervision, co-ordination, teaching, training and development of employees, student/trainees and others in an equivalent position.*

It includes work planning and allocation; checking and evaluation work; undertaking clinical supervision; identifying training needs; developing and/or implementing training programmes; teaching responsibility for such personnel functions as recruitment, discipline, appraisal and career development; and the long term development of human resources.

The emphasis is on the nature of the responsibility rather than the precise numbers of those co-ordinated trained or developed.

Factor 10 – Responsibilities for Information Resources *This factor measures the responsibilities of the job for information resources (for example, computerised; paper based; microfiche) and information systems (both hardware and software, for example, medical records).*

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.

Factor 11 – Responsibilities for Research and Development *This factor measures the responsibilities of the job for informal and formal clinical 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.*

It takes into account the nature of the responsibility (initiation, implementation, oversight of research and development activities), whether it is an integral part of the work or research for personal development purposes; and the degree to which it is shared with others.

Factor 12 – 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; the nature or system in which the job operates the position of the job within the organisation; and the existence of any statutory responsibility for service provision.

Factor 13 – Physical Effort *This factor measures the nature, level, frequency and duration of 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.*

Factor 14 – Mental Effort *This factor measures the nature, level, frequency and duration of the mental effort required for the job (for example concentration; responding to unpredictable work patterns, interruptions and the need to meet deadlines).*

Factor 15 – Emotional Effort *This factor measures the nature, level, frequency and duration demands of the emotional effort required to undertake clinical or non-clinical duties that are generally considered to be distressing and/or emotionally demanding.*

Factor 16 – Working Conditions *This factor measures the nature, level, frequency and duration of demands arising from inevitably adverse environmental conditions (such as extreme heat/cold, smells, noise and 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, carers.*

Agenda for Change Job Evaluation Scorecard
(produced by the Section General Secretary, Feb 04)

Factor	Levels	Points	Enter Your Score
<p>1. Communication & relationship skills</p> <p><i>(measures skills required to communicate, establish & maintain relationships and gain the co-operation of others)</i></p>	<ol style="list-style-type: none"> 1. Providing & receiving routine information orally to assist in undertaking own job. Mainly with work colleagues 2. Providing & receiving routine information orally, in writing or electronically, to inform work colleagues, patients, clients, carers, public, external contacts 3. (a) Providing & receiving routine information which requires tact or persuasive skills or where there are barriers to understanding or (b) Providing & receiving complex or sensitive information or (c) Providing advice, instruction or training to groups, where the subject matter is straightforward 4. Providing & receiving complex, sensitive or contentious information, where persuasive, motivational, negotiating, training, empathic or reassurance skills required. This may be because agreement or co-operation is required or because there are barriers to understanding. 5. (a) As for 4, but where skills are developed or (b) Presenting complex, sensitive or contentious information to a large group of staff or members of the public or (c) Providing & receiving complex, sensitive or contentious information, where there are significant barriers to acceptance which need to be overcome using developed interpersonal and communication skills such as would be required when communicating in a hostile, antagonistic or highly emotive atmosphere. 6. As 5c but using the highest level of interpersonal & communication skills. 	<p>5</p> <p>12</p> <p>21</p> <p>32</p> <p>45</p> <p>60</p>	
<p>2. Knowledge, training & experience</p> <p><i>(measures all forms of knowledge & practical experience. This includes theoretical and practical knowledge; professional, specialist or technical knowledge; & knowledge of policies, practices and procedures associated with the job. Takes account of educational level normally expected as well as the equivalent level of knowledge gained without taking a formal course of study.)</i></p>	<ol style="list-style-type: none"> 1. Understanding of a small number of routine work procedures which could be gained through a short induction period or on the job training. 2. Understanding of a range of routine work procedures possibly outside immediate work area, which would require job training & a period of induction 3. Understanding of a range of work procedures and practices, some of which are non-routine, which require a base level of theoretical knowledge, normally acquired through formal training or equivalent experience 4. Understanding of a range of work procedures and practices, the majority of which are non-routine, which require intermediate level theoretical knowledge. This knowledge is normally acquired through formal training or equivalent experience 5. Understanding of a range of work procedures and practices, which requires expertise within a specialism or discipline, underpinned by theoretical knowledge or relevant practical experience. 6. Specialist knowledge across the range of work procedures and practices underpinned by theoretical knowledge or relevant practical experience 7. Highly developed specialist knowledge across the range of work procedures and practices underpinned by theoretical knowledge or relevant practical experience 8. (a) Advanced theoretical & practical knowledge of a range of work procedures & practices (b) Specialist knowledge over more than one discipline/function acquired over a significant period. 	<p>16</p> <p>36</p> <p>60</p> <p>88</p> <p>120</p> <p>156</p> <p>196</p> <p>240</p>	
<p>3. Analytical & judgemental skills</p> <p><i>(taking account of</i></p>	<ol style="list-style-type: none"> 1. Judgements involving straightforward job-related facts or situations 2. Judgements involving facts or situations, some of which require analysis 	<p>6</p> <p>15</p>	

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<p><i>requirements for analytical skills (for diagnosis or understanding situations or information; & judgmental skills to find solutions & recommend/decide way forward)</i></p>	<p>3. Judgements involving a range of facts or situations, which require analysis or comparison of a range of options</p> <p>4. Judgements involving complex facts or situations, which require the analysis, interpretation and comparison of a range of options.</p> <p>5. Judgements involving highly complex facts or situations, which require the analysis, interpretation and comparison of a range of options.</p>	<p>27</p> <p>42</p> <p>60</p>	
<p>4. Planning & organisational skills</p> <p><i>(takes account of skills required for such activities as planning or organising clinical or non-clinical services, depts, rotas etc, and takes into account complexity & degree of uncertainty)</i></p>	<p>1. Organises own day to day work tasks or activities</p> <p>2. Planning & organisation of straightforward tasks, activities or programmes, some of which may be ongoing</p> <p>3. Planning & organisation of a number of complex activities or programmes, which require the formulation & adjustment of plans</p> <p>4. Planning & organisation of a broad range of complex activities or programmes, some of which are ongoing, which require the formulation & adjustment of plans or strategies</p> <p>5. Formulating long term, strategic plans, which may involve uncertainty and which may impact across the whole organisation.</p>	<p>6</p> <p>15</p> <p>27</p> <p>42</p> <p>60</p>	
<p>5. Physical skills</p> <p><i>(takes into account hand-eye co-ordination, sensory skills, dexterity, manipulation, requirements for speed & accuracy, keyboard & driving skills)</i></p>	<p>1. Minimal demand for work related physical skills</p> <p>2. Requires physical skills which are normally obtained through practice over a period of time or during practical training (eg standard driving or keyboard skills; use of some tools & types of equipment)</p> <p>3. (a) Requires physical skills to fulfil duties where there is a specific requirement for speed or accuracy (eg advanced or high speed driving; advanced keyboard use; or manipulation of objects or people with narrow margins for error) or (b) requires highly developed physical skills, where accuracy is important, but there is no specific requirement for speed (eg manipulation of fine tools or materials)</p> <p>4. Requires highly developed physical skills where high degree of precision or speed and high levels of hand, eye & sensory co-ordination are essential</p> <p>5. Requires highest level of physical skills where a high degree of precision or speed & the highest levels of hand, eye & sensory co-ordination are essential.</p>	<p>6</p> <p>15</p> <p>27</p> <p>42</p> <p>60</p>	
<p>6. Responsibilities for patient/client care</p> <p><i>(takes account nature of responsibility & level of postholder's involvement in provision of care, inc degree to which responsibility is shared. Takes account of responsibility to record care/treatment/advice/tests)</i></p>	<p>1. Assists patients/clients/relatives during incidental contacts</p> <p>2. Provides general non-clinical advice, info, guidance or ancillary services directly to patients/clients/relatives or carers</p> <p>3. (a) Provides personal care to patients/clients or (b) Provides basic clinical technical services for patients/clients or (c) Provides basic clinical advice</p> <p>4. (a) Implements clinical care/care packages or (b) Provides clinical technical advice to patients/clients or (c) Provides advice in relation to care of the individual, or grps of patients/clients</p> <p>5. (a) Develops programmes of care/care packages or (b) Provides specialist clinical technical services or (c) Provides specialised advice in relation to care of patients/clients</p> <p>6. (a) Develops specialised programmes of care/care packages or (b) Provides highly specialist clinical technical services or (c) Provides highly specialised advice concerning the care or treatment of identified grps or categories of patients/clients or (d) Accountable for direct delivery of a service within a sub-division of a clinical, clinical technical or social care service</p> <p>7. Accountable for direct delivery of a clinical, clinical technical, or social care service(s)</p> <p>8. Corporate responsibility for the provision of a clinical, clinical technical or social care service(s).</p>	<p>4</p> <p>9</p> <p>15</p> <p>22</p> <p>30</p> <p>39</p> <p>49</p> <p>60</p>	
<p>7. Responsibilities for</p>	<p>1. Follows policies in own role which are determined by others, no responsibility for service</p>		

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<p>policy & service development implementation</p> <p><i>(takes account nature, extent and level of contribution to relevant decision making process. Also takes account of whether relevant policies or services relate to a function, dept, division, directorate, whole trust or wider, and degree to which responsibility is shared with others)</i></p>	<p>development, but may be required to comment on policies, procedures or possible developments</p> <p>2. Implements policies within determined parameters and proposes changes to working practices or procedures for own work area</p> <p>3. Implements policies for own area and proposes policy or service changes which impact beyond own area of activity</p> <p>4. Responsible for policy implementation and for discrete policy or service development for a service or more than one area of activity</p> <p>5. Responsible for a range of policy implementation and policy or service development for a directorate or equivalent</p> <p>6. Corporate responsibility for major policy implementation and policy or service development, which impacts across or beyond the organisation.</p>	<p>5</p> <p>12</p> <p>21</p> <p>32</p> <p>45</p> <p>60</p>	
<p>8. Responsibilities for financial & physical resources</p> <p><i>(includes financial resources such as cash, vouchers, cheques, invoice payment, budgets, revenues, income generation and physical assets such as clinical & office equipment, tools, vehicles, premises etc)</i></p>	<p>1. Observes personal duty of care in relation to equipment & resources used in course of work.</p> <p>2. (a) Regularly handles or processes cash, cheques, patients' valuables or (b) Responsible for safe use of equipment other than equipment which they personally use or (c) Responsible for maintaining stock control and/or security of stock or (d) Authorised signatory for small cash/financial payments or (e) Responsible for safe use of expensive or highly complex equipment</p> <p>3. (a) Authorised signatory for cash/financial payments or (b) Responsible for the purchase of some physical assets or supplies or (c) Monitors or contributes to the formulation of dept/service budgets or financial initiatives or (d) Holds a delegated budget from a budget for a dept/service or (e) Responsible for repair & maintenance of physical assets</p> <p>4.(a) Budget holder for a dept/service or (b) Responsible for budget setting for a dept/service or (c) Responsible for the procurement or maintenance of all physical assets or supplies for a dept/service</p> <p>5.(a) Responsible for budget for several services or (b) Responsible for budget setting for several services or (c) Responsible for physical assets for several services</p> <p>6. Corporate responsibility for the financial resources & physical assets of an organisation.</p>	<p>5</p> <p>12</p> <p>21</p> <p>32</p> <p>45</p> <p>60</p>	
<p>9. Responsibilities for human resources</p> <p><i>(Measures management, supervision, co-ordination, teaching, training & development of employees, students/trainees. Includes work planning & allocation; checking & evaluating work; undertaking clinical supervision; identifying training needs; training programmes; CPD. Emphasis on nature of responsibility rather than precise numbers of those supervised etc)</i></p>	<p>1. Provides advice; demonstrates own activities or workplace routines to new or less experienced employees in own work area</p> <p>2. (a) Responsible for day to day supervision or co-ordination of staff within section/function of a dept/service or (b) Regularly responsible for professional/clinical supervision of a small number of qualified staff or students or (c) Regularly responsible for providing training in own discipline/practical training or undertaking basic workplace assessments or (d) Regularly responsible for the provision of basic HR advice</p> <p>3.(a) Responsible for day to day management of a group of staff or (b) Responsible for the allocation of placement or subsequent supervision of qualified staff or students or (c) Responsible for the teaching/delivery of core or specialist training on a range of subjects or (d) Responsible for the delivery of core HR advice on a range of subjects</p> <p>4.(a) Responsible as line manager for a single function or dept or (b) Responsible for the teaching or devising of training & development programmes as a major job responsibility or (c) Responsible for the delivery of a comprehensive range of HR services</p> <p>5.(a) Responsible as line manager for several/multiple depts or (b) Responsible for the management of a teaching/training function across the organisation or (c) Responsible for the management of a significant part of the HR function across the organisation</p>	<p>5</p> <p>12</p> <p>21</p> <p>32</p> <p>45</p>	

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	6. Corporate responsibility for the HR or HR function	60	
<p>10. Responsibilities for information resources</p> <p><i>(measures responsibilities for info resources and info systems, taking account of nature of responsibility & degree to which it's shared)</i></p>	<p>1. Records personally generated clinical observations, test or research results; and/or completes timesheets or similar work records</p> <p>2. (a) Responsible for data entry, text processing or storage of data, utilising paper or computer based data entry systems or (b) Occasional requirements to create or format databases or spreadsheets using computerised systems</p> <p>3.(a) Responsible for taking & transcribing formal minutes or (b) Regular requirements to create or format databases or spreadsheets using computerised systems</p> <p>4.Responsible for adapting information systems to meet the specifications of others</p> <p>5.Responsible for the design & development of significant info systems to meet the specifications of others</p> <p>6. Responsible for the mgmt of info and systems & the development of systems at dept/service level as the major job responsibility</p> <p>7. Corporate responsibility for the provision of info systems/services for the organisation</p>	<p>4</p> <p>9</p> <p>16</p> <p>24</p> <p>34</p> <p>46</p> <p>60</p>	
<p>11. Responsibilities for research & development</p> <p><i>(measures formal & informal clinical or non-clinical research & development activities, such as testing of drugs. Takes into account nature, whether integral part of work or research for personal development purposes, and degree to which shared)</i></p>	<p>1. Undertakes surveys or audits, as necessary to own work; may occasionally participate in R&D, clinical trials or equipment testing.</p> <p>2. (a) Regularly undertakes R&D activity as a requirement of the job or (b) Regularly undertakes clinical trials or (c) Regularly undertakes equipment testing or adaptation</p> <p>3.Carries out research or development work as part of one or more formal research programmes or activities as a major job requirement</p> <p>4.Responsible for co-ordinating & implementing R&D programmes or activity as a requirement of the job</p> <p>5. Responsible, as an integral part of the job, for initiating (eg securing funding) and developing R&D programmes or activities, which support the objectives or the broader organisation.</p> <p>6. Responsible, as an integral part of the job, for initiating and developing R&D programmes , which have an impact outside the organisations (eg NHS wide or outside NHS)</p>	<p>5</p> <p>12</p> <p>21</p> <p>32</p> <p>45</p> <p>60</p>	
<p>12. Freedom to act</p> <p><i>(measures accountability for own actions and those of others, to use own initiatives and act independently; and the discretion allowed to the jobholder to take action. Takes account of restrictions on freedom to act such as policies, codes of practice, position of job in organisation & statutory responsibility for service provision)</i></p>	<p>1. Generally works with supervision close by and within well-established procedures and/or practices and has standards and results to be achieved</p> <p>2. Is guided by standard operating procedures, good practice, established precedents and understands what results or standards are to be achieved. Someone is generally available for reference and work may be checked on a sample/random basis</p> <p>3. Is guided by precedent and clearly defined occupational policies, protocol/procedures or codes of conduct. Work is managed, rather than supervised, and results/outcomes are assessed at agreed intervals</p> <p>4. Expected results are defined but the post holder decides how they are best achieved. Is guided by principles and broad occupational policies or regulations. Guidance may be provided by peers or external reference points</p> <p>5. Is guided by general health, organisational or broad occupational policies, but in most situations the post holder will need to establish the way in which there should be interpreted</p> <p>6. Is required to interpret overall health service policy and strategy, in order to establish goals and standards</p>	<p>5</p> <p>12</p> <p>21</p> <p>32</p> <p>45</p> <p>60</p>	

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<p>13. Physical effort <i>(measures nature, level, frequency & duration)</i></p>	<p>1. A combination of sitting, standing and walking with little requirement for physical effort. There may be a requirement to exert light physical effort for short periods.</p> <p>2. (a) There is a frequent requirement for sitting or standing in a restricted position for a substantial proportion of the working time or (b) There is a frequent requirement for light physical effort for several short periods during a shift or (c) There is an occasional requirement to exert light physical effort for several long periods during a shift or (d) There is an occasional requirement to exert moderate physical effort for several short periods during a shift</p> <p>3.(a) There is a frequent requirement to exert a light physical effort for several long periods during a shift or (b) There is an occasional requirement to exert moderate physical effort for several long periods during a shift or (c) There is a frequent requirement to exert moderate physical effort for several short periods during a shift or</p> <p>4. (a) There is an ongoing requirement to exert light physical effort or (b) There is a frequent requirement to exert moderate physical effort for several long periods during a shift or (c) There is an occasional requirement to exert intense physical effort for several short periods during a shift</p> <p>5. (a) There is an ongoing requirement to exert moderate physical effort or (b) There is a frequent requirement to exert intense physical effort for several short periods during a shift or (c) There is an occasional requirement to exert intense physical effort for several long periods during a shift</p>	<p>3</p> <p>7</p> <p>12</p> <p>18</p> <p>25</p>	
<p>14. Mental effort <i>(measures nature, level, frequency & duration of mental effort)</i></p>	<p>1. General awareness and sensory attention; normal care and attention; an occasional requirement for concentration where the work pattern is predictable with few competing demands for attention</p> <p>2. (a) There is a frequent requirement for concentration where the work pattern is predictable with few competing demands for attention or (b) There is an occasional requirement for concentration where the work pattern is unpredictable</p> <p>3.(a) There is a frequent requirement for concentration where the work pattern is unpredictable or (b) There is an occasional requirement for prolonged concentration</p> <p>4. (a) There is a frequent requirement for prolonged concentration or (b) There is an occasional requirement for intense concentration</p> <p>5. There is a frequent requirement for intense concentration</p>	<p>3</p> <p>7</p> <p>12</p> <p>18</p> <p>25</p>	
<p>15. Emotional effort <i>(measures nature, level, frequency & duration demands)</i></p>	<p>1. Exposure to distressing or emotional circumstances is rare</p> <p>2. Occasional exposure to distressing or emotional circumstances</p> <p>3. (a) Frequent exposure to distressing or emotional circumstances or (b) Occasional exposure to highly distressing or highly emotional circumstances</p> <p>4.(a) Occasional exposure to traumatic circumstances or (b) Frequent exposure to highly distressing or highly emotional circumstances</p>	<p>5</p> <p>11</p> <p>18</p> <p>25</p>	
<p>16. Working conditions <i>(measures nature, level, frequency & duration demands)</i></p>	<p>1. Exposure to unpleasant working conditions or hazards is rare</p> <p>2. (a) Occasional exposure to unpleasant working conditions or (b) Occasional requirement to use road transport in emergency situations or (c) Frequent requirement to use road transportation or (d) Frequent requirement to work out doors or (e) Requirement to use VDU equipment more or less continuously on most days</p> <p>3.(a) Frequent exposure to unpleasant working conditions or (b) Occasional exposure to highly unpleasant working conditions</p>	<p>3</p> <p>7</p> <p>12</p>	

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	4.(a) Some exposure to hazards or (b) Frequent exposure to highly unpleasant working conditions	18	
	5. Considerable exposure to hazards	25	

Pay bands & job weights

Pay Band	Job Weight	Pay Band	Job Weight
1	0-160	7	466-539
2	161-215	8a	540-584
3	216-270	8b	585-629
4	271-325	8c	630-674
5	326-395	8d	675-720
6	396-465	9	721-765

**Salary scales (at April 2004)
Increased by 3.225% in April 2005
Excludes Special Transitional Assimilation Points**

Pay Band	Salary Range	Pay Band	Salary Range
1	£11,135 - £12,147	7	£26,106 - £34,417
2	£11,508 - £14,278	8a	£33,298 - £39,958
3	£13,266- £15,877	8b	£38,786 – £47,949
4	£15,504 - £18,647	8c	£46,671 - £57,539
5	£18,114 - £23,442	8d	£55,941, - £69,260
6	£21,630 - £29,302	9	£66,063 - £83,546