



# JOB EVALUATION POLICY – SUPPORT STAFF

Thinking Schools Academy Trust  
“Transforming Life Chances”

This policy was adopted on

March 2022

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## Introduction

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The Thinking Schools Academy Trust has introduced new job evaluation arrangements to ensure a consistent and fair approach across the Trust regarding support staff jobs. This was implemented in September 2021.

All new roles or changes to an existing role of more than 25% should undergo job evaluation.

## 1. The Scheme

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All evaluations will be carried out using the Local Government Single Status Job Evaluation scheme developed by the National Joint Council (NJC) for Local Government Services.

The scheme consists of 13 factors which are outlined below, the full description of each can factor can be found in appendix 2.

1. Knowledge
2. Mental Skills
3. Interpersonal Skills
4. Physical Skills
5. Initiative and Independence
6. Physical Demands
7. Mental Demands
8. Emotional Demands
9. Responsibility for People
10. Responsibility for Supervision
11. Responsibility for Financial Resources
12. Responsibility for Physical Resources

Senior manager roles are evaluated under the NJC Management scheme.

## 2. Evaluating Jobs

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The Trust has evaluated all support staff jobs using the NJC scheme.

The Scheme considers several factors including sub factors, and each job is measured in terms of its accountability and demands.

Within the Trust roles have been split in to the following job family;

- Pastoral
- Office Admin
- Education Support
- Lunch and Wrap around care
- Exams
- Central; Thinking Technology, Thinking Facilities, Thinking Financials, Thinking Personnel, Thinking Creative and Business Development
- Senior Management

An employee is entitled to have a copy of the Job Description and Role Profile, which relates to their role.

All role profiles and template job descriptions are held centrally; schools have personalised job descriptions to ensure they are school specific where required.

The Trust has several trained job evaluators, who have been trained by the Local Government Association (LGA), the evaluators include HR Team members and Executive Business managers.

Senior Managers are evaluated externally by the LGA.

### 3. Evaluation Procedure

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A post or group of posts will be subject to the job evaluation process in the following circumstances:

- a new post is created;
- an employee believes there has been a substantial change to their role (at least 25%);
- where a management review of the post results in a substantial change to the duties and responsibilities of the post;
- As part of a regular review of the Job Evaluation scheme, as agreed with the Trade Unions.

#### 3.1 New Posts

##### Definition of New Posts

A post will be regarded as 'new' for the purposes of Job Evaluation where the duties and responsibilities identified in the job description have not existed before.

The grade for the new post will be determined using the procedure outlined in this policy prior to the commencement of any recruitment procedures either internally or externally, unless alternative arrangements are agreed by Senior Management.

This procedure should be built into the recruitment timetable accordingly.

### Documentation Required



The line manager will be responsible for devising the Job Description and Person Specification with the support of HR where required for the new post, completing the job evaluation request form (appendix 3) and the job questionnaire (appendix 6).

- Where possible, the line manager should identify a comparable post to aid the evaluation.
- These documents require approval by the Headteacher before they are submitted.
- These documents must be submitted to The Schools Executive Business Manager and HR Partner for review.

### Evaluation

#### Stage 1

The Executive Business Manager and/or HR Partner will undertake a formal evaluation using the NJC scheme, consulting with the line manager and/or Headteacher.

#### Stage 2

The evaluation will be audited by another trained job evaluator, paying attention to any areas of concern. Where necessary, the evaluation will be revisited and subsequently re-evaluated.

#### Stage 3

The Head of HR and/or Deputy Head of HR will consider where the factor sits within the organisation and will sign off the evaluation or if needed refer for further evaluation.



#### Time scales

All evaluations of new roles will be reviewed and an outcome delivered within 10 working days of all paperwork being submitted. This should be built in to the recruitment process.

### 3.2 Re-evaluation

An employee or the manager has the right to request a re-evaluation of the grading of their post if there have been substantial changes to the duties or responsibilities of their post, or where there has been a transfer of duties from elsewhere such that

the character of the post is substantially altered. However, such a request may not be made within 12 months of either:

- Their appointment to the post, or
  - The date of notification of any previous evaluation process
- Whoever instigates a re-evaluation is required to complete the necessary paperwork.
  - If an employee requests a re-evaluation they must ensure they have the support of their line manager before submitting a request for re-evaluation.
  - If a line manager does not support the request for re-evaluation it will be referred to the Headteacher whose decision will be final.
  - In order for a role to be re-evaluated there must be a significant change of at least 25%.

### Documentation required



A revised job description and person specification should be submitted highlighting the aspects of the post that have changed. The employee or line manager (depending who has instigated the review) will also be required to complete the re-evaluation request form (appendix 4) and the job role questionnaire (appendix 6).

- These documents require approval by the Headteacher before they are submitted.
- The documents must be submitted to The Schools Executive Business Manager and HR Partner for review.

### Evaluation

#### Stage 1

The Executive Business Manager and/or HR Partner will undertake a formal evaluation using the NJC scheme, consulting with the line manager and/or Headteacher.

#### Stage 2

The evaluation will be audited by another trained job evaluator, paying attention to any areas of concern. Where necessary, the evaluation will be revisited and subsequently re-evaluated.

#### Stage 3

The Head of HR and/or Deputy Head of HR will consider where the factor sits within the organisation and will sign off the evaluation or if needed refer for further evaluation.



#### Time scales

All re-evaluations will be reviewed and outcome delivered in writing within 20 working days.

#### Effective date of salary change

All changes to salary will be effective from the date that the request for re-evaluation is signed off by the line manager/Headteacher.



#### Salary Protection

If the grade determined for the post is lower than the employee's existing grade, salary protection will apply. This will be for a period of 3 years.

Please refer to the Trust redundancy and restructure policy for full details on salary protection.

## 4. Appeal

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Employees will be entitled to appeal against the outcome of the job evaluation process once they have been notified of the job evaluation outcome.

### 4.1 Grounds for Appeal

The grounds on which appeals against the outcome of job evaluation can be made are as follows:

#### Ground 1

The role profile or level does not accurately reflect their role and as a result the employee believes they have been matched to the wrong job.

#### Ground 2

The job is unique, or significantly different, and the employee believes they should have been evaluated separately to other employees who undertake this job

#### Ground 3

The role profile or level does not accurately reflect the role and as a result the employee believes the post has been incorrectly evaluated

#### Ground 4

The job has not been evaluated at the same level as roles that the post holder believes are like their role within the structure.

An appeal must be made on one or more of the above grounds.

## 4.2 Submitting the Appeal

To resolve any queries, errors or anomalies staff may want to raise an informal appeal in the first instance to allow these issues to be resolved prior to submitting a formal appeal.

Whether or not an employee appeals informally they will still be able formally appeal the outcome.



Employees are required to submit an appeal within 10 working days from the date of the letter notifying them of their job evaluation outcome. Extensions will only be given in exceptional circumstances.

Employees who are on leave, for example maternity or sickness are required to submit an appeal in line with the timescales referred to above.

Appeals should be submitted using the job evaluation appeal form (see appendix 5).

The appeal form should be fully completed and employees should state and provide the evidence to support their grounds for appeal.

Where supporting evidence and/or a detailed explanation is not given the appeal will be rejected and the employee will be informed of this in writing.

The appeal form will ask the employee if the appeal is being submitted on behalf of one or more job holders and whether the employee sees the appeal as affecting a wider group.

## 4.3 Appeal Stages

### Informal

We understand that the job evaluation scheme may be confusing and we recognise that some employees may not wish to formally appeal but may have queries or questions regarding the outcomes of the job evaluation.

Employees may wish to understand more about their score and the scheme prior to making a decision if they wish to appeal.

Therefore, the informal stage allows for these areas to be resolved through this provision rather than a formal appeal.



For example, there may be an error where an employee has been obviously matched to the wrong profile in error and this can be resolved informally without the need for an appeal to be submitted.

If you have any queries or questions please discuss these as soon as possible with your line manager or Headteacher in the first instance who will be able to liaise with the HR Team to seek a resolution.

### Formal

An Appeals Panel will consist of at least 2 members of staff who have been trained in the NJC job evaluation scheme.

The purpose of the appeal at Stage 1 is for the Panel to:

- Fully understand from the employee the grounds for their appeal and the role they undertake
- Fully understand from the line manager/Headteacher the role the employee undertakes and the reason for the job match
- Consider the evidence presented by the employee
- Review the relevant role profile

The options available to the Panel are:

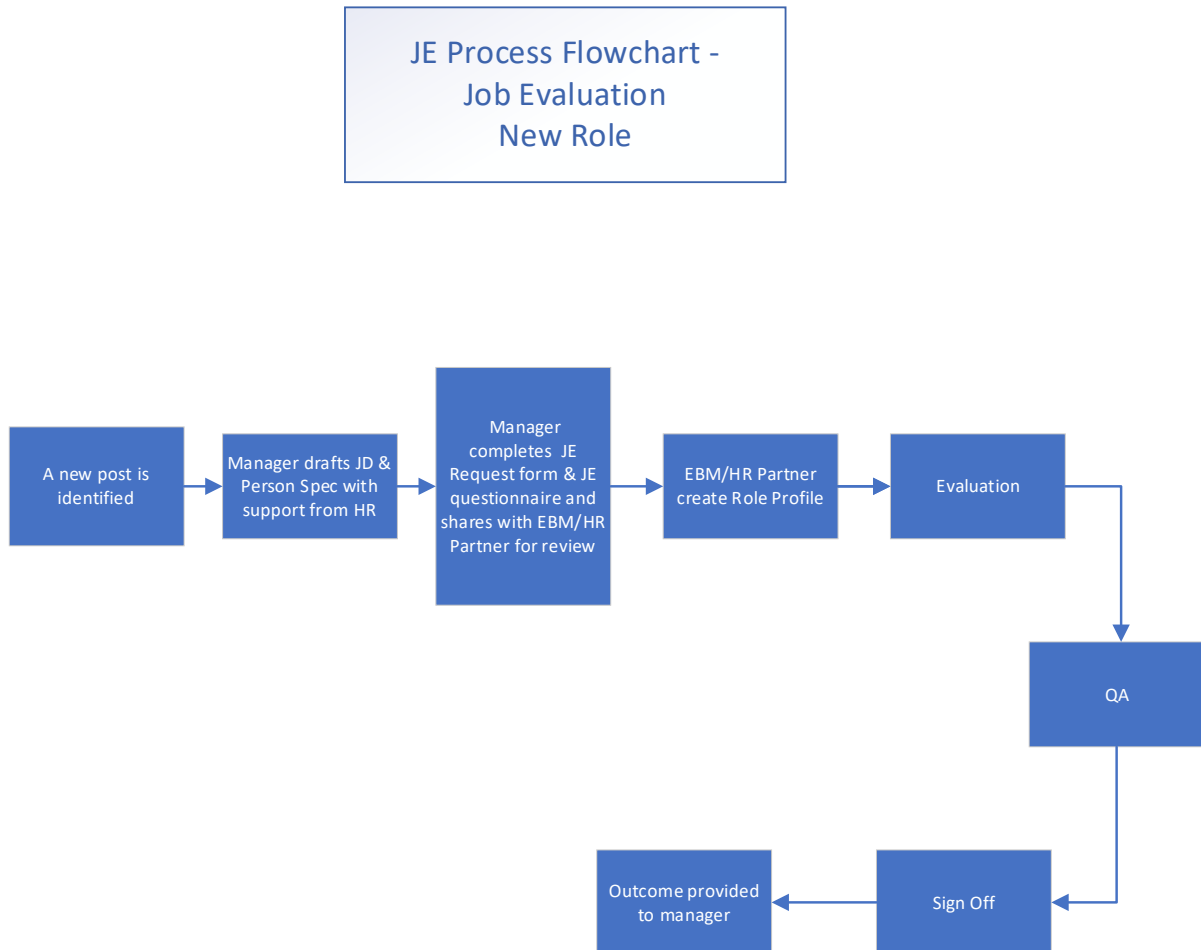
- There are insufficient grounds to uphold the appeal
- There is sufficient information to warrant the role to be re-evaluated
- There are sufficient grounds to uphold the appeal without the need for the role to be evaluated e.g. where the employee has been matched to the wrong job
- There is sufficient information to demonstrate that the role profile does not accurately reflect the role and therefore the role requires a separate evaluation to be carried out



The employee will be informed of the outcome of their appeal in writing within 20 working days. The results of the appeal could alter the Job Evaluation score and therefore could change the employee's job score either up or down or it could remain the same. Any re scoring could affect all jobholders matched to the job.

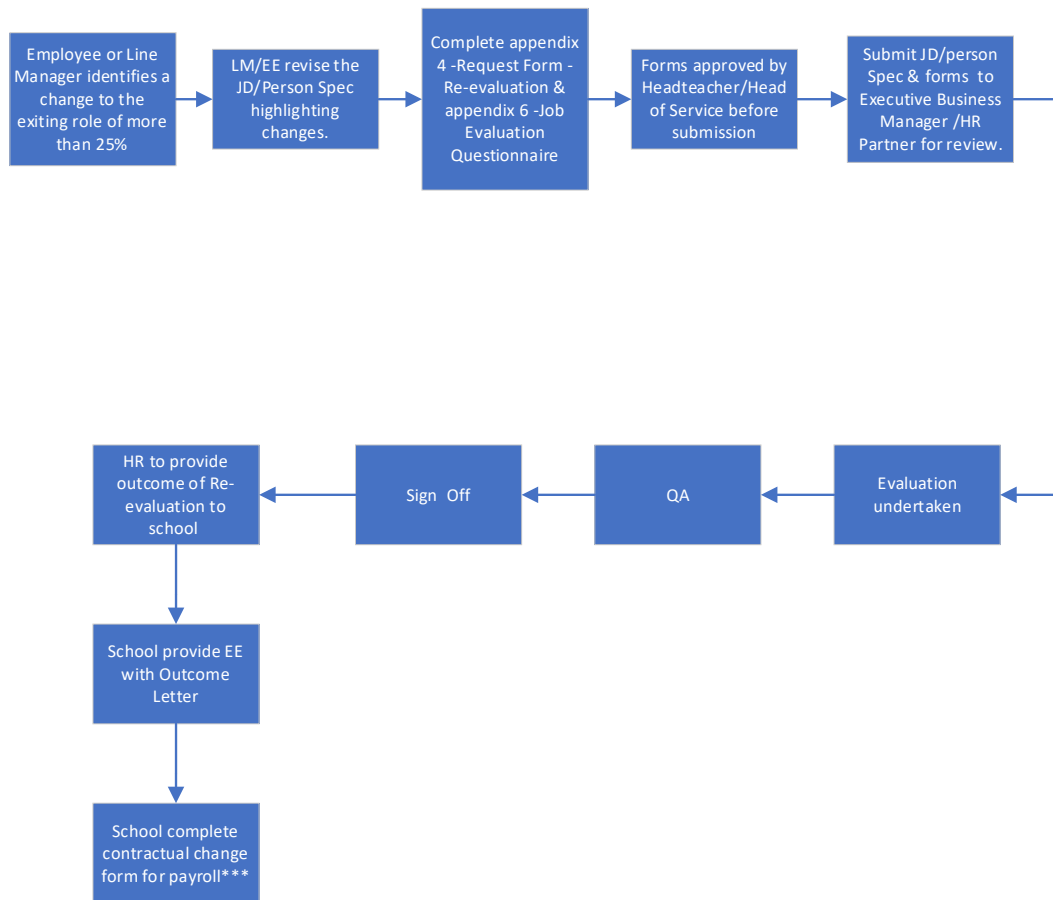
## Appendix 1 – Process Flow Chart

New Role



## Re-Evaluation

### Job Evaluation Flowchart - Re-Evaluation

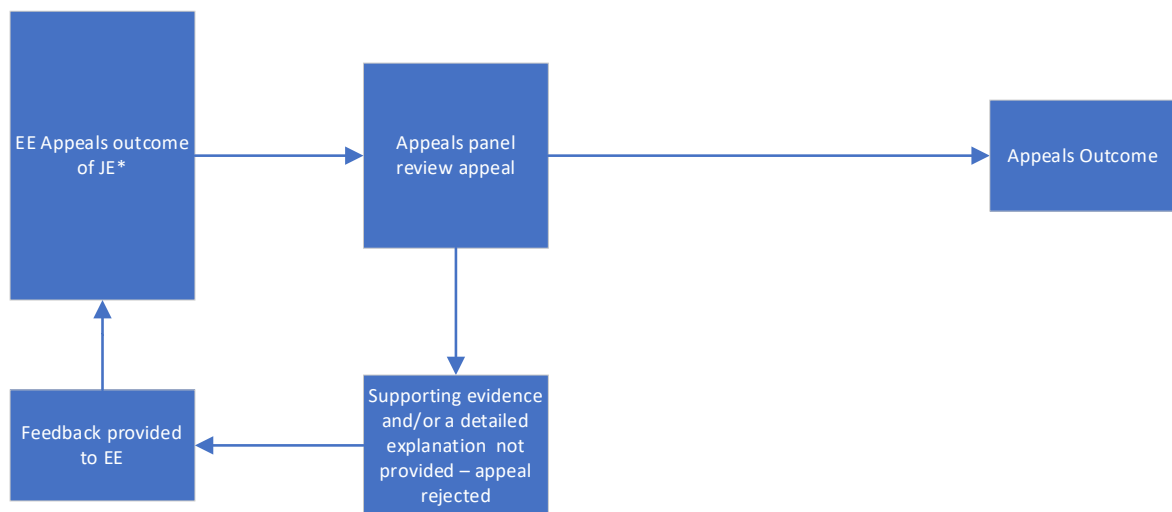


\*All changes to salary will be effective from the date that the request for re-evaluation is signed off by the line manager/Headteacher.

\*\* If the grade determined for the post is lower than the employee's existing grade, salary protection will apply. This will be for a period of 3 years.

## Appeal

### Job Evaluation Flowchart - Appeals Process



\*Employees are required to submit an appeal within 10 working days from the date of the letter notifying them of their job evaluation outcome. Extensions will only be given in exceptional circumstances.

## Appendix 2 – NJC Scheme – Factor and Score Explanation



Appendix 2 - NJC  
Scheme - Factor and !

### Appendix 3 – Job Evaluation Request Form – New Post

Academy/Department	
Job title	
Job Family	
Is this a new role?	
Has this role been advertised in the past 12 months?	
Is there an existing role profile that this role could be matched to?	
Anticipated Job Type	
Anticipated Grade	
Documents Attached	
Job Description	
Person Specification	
Job Questionnaire (appendix 6)	
Other	
Additional information	

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<b>Line Manger</b>
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<b>Name:</b>	<b>Signature:</b>	<b>Date:</b>
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<b>Verification by Headteacher</b> <i>Review the line managers request and provide any comments regarding the new post</i>
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<b>Name:</b>	<b>Signature:</b>	<b>Date:</b>
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<b>Approval by Executive Business Manager</b>
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<b>Name:</b>	<b>Signature:</b>	<b>Date:</b>
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## Appendix 4 – Job Evaluation– Re-Evaluation of Post – Request Form

### Employee Details

Employee Name	
Job Title	
Academy	
Line Manager	
Current role profile match	
Current role profile score	
Current Grade	
Current Salary	

Who is requesting the re-evaluation?

Employee (Individual)  Employee (Group)  Line Manager

Is this a new post in the last 12 months? YES/NO

Have you requested a re-evaluation in the last 12 months? YES / NO

*Please note if you answer yes to either of the above your request will not be considered further.*

Are you seeking for the role to be re-graded as an outcome of the evaluation? YES / NO

What grade do you believe the role should be regraded to?

### Re-evaluation Details

Please indicate which of the grounds you wish to request a re-evaluation by ticking one or more of the following boxes.

Grounds	Reason	Please tick below
1	The employee believes there has been a substantial change to their role	
2	Management review of the post has resulted in a substantial change to the duties and responsibilities of the post	



3	there has been a transfer of duties from elsewhere such that the character of the post is substantially altered	
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Additional documentation enclosed:

Updated job description  Updated Person Specification  Other

**Re-evaluation Information**

Please tick the factors that you wish to be re-evaluated against and attach any evidence in support of why you feel you should be re-evaluated;

FACTOR	Please tick relevant factor	List evidence attached
Knowledge		
Mental Skill		
Interpersonal Communication		
Physical Skills		
Initiative & Independence		
Physical Demands		
Mental Demands		
Emotional Demands		
Responsibility for People		
Responsibility for Financial Resources		
Responsibility for Supervision		
Responsibility for Physical Resources		
Working Conditions		

FACTOR	Reason for re-evaluation
<b>Knowledge</b> <i>We are looking here at all the knowledge normally required to do the job properly, including any which is essential in background or context to the work</i>	
<b>Mental Skill</b>	

<p><i>Mental skills include fact finding, analytical, problem solving, and judgmental skills. They also include creative and developmental skills, whether related to design, handling of people or development of policies and procedures; and planning and strategic skills.</i></p>	
<p><b>Interpersonal Communication</b>  <i>Interpersonal skills are those which involve developing some form of working relationship with others, for example caring skills for responding to their needs, training skills for identifying and responding to learning needs; persuasive, motivating or counselling skills.</i></p>	
<p><b>Physical Skills</b>  <i>Physical skills cover manual or finger dexterity, hand-eye co-ordination of limbs and sensory co-ordination.</i></p>	
<p><b>Initiative &amp; Independence</b>  <i>We are looking here at the scope allowed to the jobholder to exercise initiative, take independent actions and plan own work. This factor takes into account the nature and level of supervision of the jobholder, the level and degree of direction and guidance provided by policies, precedents, procedures, and regulations and whether the jobholder works on won or with others</i></p>	
<p><b>Physical Demands</b>  <i>Physical demands cover all forms of bodily effort, for example, standing and walking, lifting and carrying, pulling and pushing; working in awkward positions, bending, crouching, stretching, sitting, standing or working in a constrained position, stamina and strength</i></p>	
<p><b>Mental Demands</b>  <i>Mental demands cover mental concentration, alertness and attention, awareness and other forms of work related pressure, for instance, arising from</i></p>	

<p><i>conflicting work demands, interruptions or the need to switch between varied tasks or activities</i></p>	
<p><b>Emotional Demands</b>  <i>Emotional demands are those arising from contacts or work with other people. For instance, those who are angry, difficult, upset, or unwell; or in circumstances such as to cause stress to the jobholder, for example, if the people are terminally ill, very frail, at risk of abuse, homeless or disadvantaged in some other way</i></p>	
<p><b>Responsibility for People</b>  <i>We are looking here at responsibility for people, which includes responsibilities for the physical, social, economic and environmental wellbeing of any people, other than employees supervised or managed by you.</i></p>	
<p><b>Responsibility for Financial Resources</b>  <i>We are looking here at responsibility for financial resources including cash, cheques, debits and credits, invoices, budgets and income, business planning and long term development of financial resources.</i></p>	
<p><b>Responsibility for Supervision</b>  <i>We are looking here at the responsibility for training, supervision, co-ordination or management of employees, or others in an equivalent position.</i></p>	
<p><b>Responsibility for Physical Resources</b>  <i>Responsibility for physical resources covers all traditional physical resources but also includes manual or computerised information, data and records.</i></p>	
<p><b>Working Conditions</b>  <i>We are looking here at your exposure in your job to disagreeable, uncomfortable, or hazardous working conditions arising</i></p>	

<i>from the environment or from working with people.</i>	
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<p><b>Additional information</b>  <i>Please use this section to include any further information that you would like to include in the request but does not fit into any of the above sections, continue on a separate sheet if required.</i></p>
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<p><b>Verification by line manager if requested by employee/Headteacher if requested by line manager</b>  <i>Review the employee evidence provided and provide any comments regarding the accuracy of the factual information</i></p>
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Manager name:	Manager signature:	Date:
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Employee Signature (If requested by employee)

By signing the form below you are confirming that the information provided in the form and as additional information is accurate and that you have read and understood the Job Evaluation re-evaluation request procedure

Employee Name :	
Employee Signature :	
Date:	

## Appendix 5 – Job Evaluation Outcome- Appeal Form

### Employee Details

Full Name	
Job Title	
Academy	
Line Manager	

### Appeal Details

There are four grounds for appeal. Please indicate which of the grounds you wish to appeal against in relation to the outcome of the job evaluation process by ticking one or more of the following boxes.

Grounds	Reason	Please tick below
1	The role profile or level does not accurately reflect their role and as a result the employee believes they have been matched to the wrong job.	
2	The job is unique, or significantly different, and the employee believes they should have been evaluated separately to other employees who undertake this job	
3	The role profile or level does not accurately reflect the role and as a result the employee believes the post has been incorrectly evaluated	
4	The job has not been evaluated at the same level as roles that the post holder believes are similar to their role within the structure.	

### Type of appeal

Individual       Group

### Appeal Information

Please tick the factors that you wish to appeal against and attach any evidence in support of your appeal

FACTOR	Please tick relevant factor	List evidence attached
Knowledge		
Mental Skill		

Interpersonal Communication		
Physical Skills		
Initiative & Independence		
Physical Demands		
Mental Demands		
Emotional Demands		
Responsibility for People		
Responsibility for Financial Resources		
Responsibility for Supervision		
Responsibility for Physical Resources		
Working Conditions		

<b>FACTOR</b>	Reason for appeal
<b>Knowledge</b> <i>We are looking here at all the knowledge normally required to do the job properly, including any which is essential in background or context to the work</i>	
<b>Mental Skill</b> <i>Mental skills include fact finding, analytical, problem solving, and judgmental skills. They also include creative and developmental skills, whether related to design, handling of people or development of policies and procedures; and planning and strategic skills.</i>	
<b>Interpersonal Communication</b> <i>Interpersonal skills are those which involve developing some form of working relationship with others, for example caring skills for responding to their needs, training skills for identifying and responding to learning needs; persuasive, motivating or counselling skills.</i>	
<b>Physical Skills</b>	

<p><i>Physical skills cover manual or finger dexterity, hand-eye co-ordination of limbs and sensory co-ordination.</i></p>	
<p><b>Initiative &amp; Independence</b>  <i>We are looking here at the scope allowed to the jobholder to exercise initiative, take independent actions and plan own work. This factor takes into account the nature and level of supervision of the jobholder, the level and degree of direction and guidance provided by policies, precedents, procedures, and regulations and whether the jobholder works on won or with others</i></p>	
<p><b>Physical Demands</b>  <i>Physical demands cover all forms of bodily effort, for example, standing and walking, lifting and carrying, pulling and pushing; working in awkward positions, bending, crouching, stretching, sitting, standing or working in a constrained position, stamina and strength</i></p>	
<p><b>Mental Demands</b>  <i>Mental demands cover mental concentration, alertness and attention, awareness and other forms of work related pressure, for instance, arising from conflicting work demands, interruptions or the need to switch between varied tasks or activities</i></p>	
<p><b>Emotional Demands</b>  <i>Emotional demands are those arising from contacts or work with other people. For instance, those who are angry, difficult, upset, or unwell; or in circumstances such as to cause stress to the jobholder, for example, if the people are terminally ill, very frail, at risk of abuse, homeless or disadvantaged in some other way</i></p>	
<p><b>Responsibility for People</b>  <i>We are looking here at responsibility for people, which includes responsibilities for the physical, social, economic and environmental wellbeing of any people, other than employees supervised or managed by you.</i></p>	

<p><b>Responsibility for Financial Resources</b>  <i>We are looking here at responsibility for financial resources including cash, cheques, debits and credits, invoices, budgets and income, business planning and long term development of financial resources.</i></p>	
<p><b>Responsibility for Supervision</b>  <i>We are looking here at the responsibility for training, supervision, co-ordination or management of employees, or others in an equivalent position.</i></p>	
<p><b>Responsibility for Physical Resources</b>  <i>Responsibility for physical resources covers all traditional physical resources but also includes manual or computerised information, data and records.</i></p>	
<p><b>Working Conditions</b>  <i>We are looking here at your exposure in your job to disagreeable, uncomfortable, or hazardous working conditions arising from the environment or from working with people.</i></p>	

**Additional information**  
*Please use this section to include any further information that you would like to include in the appeal but does not fit into any of the above sections, continue on a separate sheet if required.*

**Verification by line manager / Headteacher**  
*Review the employee evidence provided and provide any comments regarding the accuracy of the factual information*

<b>Manager name:</b>	<b>Manager signature:</b>	<b>Date:</b>
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## Employee Signature

This form should be submitted to the Job Evaluations Team ([HR@tsatrust.org.UK](mailto:HR@tsatrust.org.UK)) within working 10 days of you receiving your letter.

By signing the form below you are confirming that the information provided in the form and as additional information is accurate and that you have read and understood the Job Evaluation Appeals Procedure.

Employee Name :	
Employee Signature :	
Date:	

## Appendix 6 – Job Evaluation Questionnaire – New Post

<b>JOB ROLE QUESTIONNAIRE</b> Please answer <b>ALL</b> questions	
<b>JOB FAMILY:</b>	
<b>JOB ROLE:</b>	
<b>What are the main tasks of your role</b>	<b>% of time you spend on this task</b>
<b>Are there any additional tasks and duties that you carry out that you feel we should be aware of that are not listed on your job description?</b>	<b>How often to carry out this task? i.e. Weekly, monthly, termly</b>
<b>Knowledge</b>	<p>To look at all the knowledge normally required to do the job properly, including any which are essential in background or context to the work.</p> <p><b>Questions to help you understand the factor:</b></p> <ol style="list-style-type: none"> <li>1. What do you need to know to be able to do your job properly?</li> <li>2. How do you gain this knowledge?</li> </ol>
<b>MATCHED Role Profile statement:</b>	
How do you use Literacy & Numeracy in your role:	How is it acquired?

What procedures do you follow?	How did you learn to follow these procedures?
What special equipment do you use to do your role?	How did you learn to use this equipment?
What IT/Software programmes help you to do your role?	How did you learn to use these systems?
Is there any further knowledge needed for you role that is not listed?	How did you acquire this knowledge?
<b>Mental Skills</b>	<p>Mental skills include fact finding, analytical, problem solving and judgmental skills. They also include creative and developmental skills, whether related to design, handling of people or development of policies and procedures; and planning and strategic skills.</p> <p><b>Questions to help you understand the factor:</b></p> <ol style="list-style-type: none"> <li>1. What do you need to think about to do your job?</li> <li>2. What analytical, problem solving and judgement skills you need to do the role?</li> </ol>
<b>MATCHED Role Profile statement:</b>	
Provide an example of a decision or a problem you might solve i.e. decisions or recommendations you make, or problems you solve, on a day-to-day, or regular, basis:	
Provide an example of the most difficult or important decisions that you make:	

Provide an example where you have had to interpret or analyse information to make a decision or solve a problem

How often are you expected to make decisions or solve these problems? (E.g. Daily/Weekly)

Do you ever have to interpret or analyse information or situations in order to make a decision or recommendation, or to solve a problem?

**Y/N**

If YES, please provide an example of decision/recommendation/problem:

What is the nature and complexity of information/situation?

How do you interpret or analyse the information/situation?

Please rank the following statements according to how typically they apply to the job (1= most typical, 2= next most typical etc.). Leave blank any statements which do not apply.

- The work is designed in such a way that creative and developmental skills are not necessary.
- The work requires creative skills for solving straightforward problems.
- The work requires creative and developmental skills for solving varied problems The work requires creative and developmental skills for solving difficult problems
- The work requires creative and developmental skills for producing innovative solutions to major problems

Please provide an example for the option you have marked 1, as being most typical.

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Does your work require you to plan ahead or organise for the future?  
**Y/N**  
 If YES, please provide an example and the period of time needed to plan:

What other forms of mental skill are required for your role?

<b>Interpersonal and Communication Skills</b>	<p>Interpersonal skills are those which involve developing some form of working relationship with others, for example caring skills for responding to their needs, training skills for identifying and responding to learning needs; persuasive, motivating or counselling skills.</p> <p><b>Questions to help you understand the factor:</b></p> <ol style="list-style-type: none"> <li>1. Who do you work with and how do you communicate with them?</li> <li>2. What is the context, complexity and nature of your communication with teachers, staff and parents?</li> </ol>
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**MATCHED Role Profile statement:**

Below is a list of interpersonal and communication skills. Select the skills most relevant to you role and provide an example of what each is used for and with whom they are used.

SKILL	EXAMPLE	WHO
Caring skills		
Training skills		

Team working skills		
Motivational/team leading skills – includes own staff		
Advising, guiding skills		
Persuading, influencing skills		
Counselling skills		
Conciliating skills		
Advocacy skills		
Negotiating skills		
Oral (spoken) communication skills		

Written communication skills		
Oral presentation skills		
Other interpersonal or communication skills		

Please add in anything that you think may be relevant to communication within your role including if you use a language other than English or sign language:

**Physical Skills**

Physical skills cover manual and finger dexterity, hand-eye co-ordination, co-ordination of limbs, and sensory co-ordination.

**Questions to help you understand the factor:**

1. What physical tasks do you have to perform and how complex are they?
2. What physical skills are required to do the role: (including finger dexterity, hand-eye co-ordination of limbs and sensory co-ordination)

**MATCHED Role Profile statement:**

Below is a list of physical skills. Select the skills most relevant to you role and provide an example of what each is used for

Not required, or 2-finger operation with no time constraints	
Precision required, keyboard used for some aspects of work	

Precision and speed, keyboard skills integral to main duties	
Considerable precision and speed, keyboard skills e.g. for data input	
Driving Skills	
<p>Are there any other forms of physical skill (dexterity, co-ordination or sensory skills) required for your job (e.g. for operating equipment, machinery or tools for preparing food)?  If <b>YES</b>, what skill(s) are required and for what purposes? Please explain any requirements for precision or speed in the use of the skills.</p>	
<p>Please add in anything that you think may be relevant to the physical skills within this role:</p>	
<p><b>Initiative &amp; Independence</b></p>	<p>The scope allowed to the jobholder to exercise initiative, take independent actions and plan own work. Taking into account the nature and level of supervision of the jobholder, the level and degree of direction and guidance provided by policies, precedents, procedures and regulations, and whether the jobholder works on own or with others.</p> <p><b>Questions to help you understand the factor:</b></p> <ol style="list-style-type: none"> <li>1. How do you know what you should be doing each day?</li> <li>2. How independent do you have to be to do the role?</li> </ol>
<p><b>MATCHED Role Profile statement:</b></p>	



How do you know what you should be doing each day?

What instructions, procedures, policies, legislation, govern you work

Give 2 examples of problems or decision you would deal with yourself, without reference to a supervisor or manager

- 1.
- 2.

Give 2 examples of problems or decisions you would refer to your supervisor or manager:

- 1.
- 2.

What form(s) of direction, management or supervision do you receive, from whom and how often?

<b>Physical Demands</b>	<p>Physical demands cover all forms of bodily effort, for example, that required for standing and walking, lifting and carrying, pulling and pushing; for working in awkward positions, for example, bending, crouching, stretching, sifting, standing or working in a constrained position; stamina and strength.</p> <p><b>Questions to help you understand the factor:</b></p> <ol style="list-style-type: none"><li>1. What forms of bodily effort do you need to do your job?</li></ol>
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2. Combination of standing, sitting or walking.

**MATCHED Role Profile statement:**

Does your job require you to sit in a fixed or constrained position (e.g. sitting at a computer keyboard or in a vehicle driving seat)

**Y / N**

If **YES**, please describe the purpose and the length of time?

Does your job require lifting and/or carrying of items or equipment (beyond light office materials, such as pens, pencils and limited quantities of paper)?

**Y / N**

If **YES**, please describe the purpose, distance and the length of time?

Does your job require rubbing, scrubbing, digging or similar form of physical effort?

**Y / N**

If **YES**, please describe the action and the length of time

Does your job require pushing and/or pulling of items or equipment?

**Y / N**

If **YES**, please describe the weight, distance and the length of time?

Does your job require working in an awkward position (e.g. crouching, kneeling)?

**Y / N**

If **YES**, please describe the purpose and the length of time?

What other Physical demands are there for the role?

**Mental Demands**

Mental demands cover mental concentration, alertness and attention, and awareness; and other forms of work related pressure,

for instance, arising from conflicting work demands, interruptions or the need to switch between varied tasks or activities.

**Questions to help you understand the factor:**

1. What levels of both mental and sensory concentration do you need for your job?
2. What is the degree and frequency of the concentration, alertness and attention to detail required by your role

**MATCHED Role Profile statement:**

Does your role require more than general awareness and sensory (i.e. using eyes, ears, touch or smell) attention, (e.g. more than general attention for watching children at play, word processing text or inputting data)?

**Y / N**

If **YES**, please describe the tasks, how long you will do it for and how often?

Does your role require more than general mental attention or concentration (e.g. more than general mental attention for repeated manual calculations, drafting a complex report)?

**Y / N**

If **YES**, please describe the tasks, how long you will do it for and how often?

Is your role subject to work-related pressures e.g. regular deadlines, frequent interruptions, conflicting demands?

**Y / N**

If **Yes**, please describe the type of pressure, how long you will do it for and how often?

What other Mental demands are there for the role?

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<b>Emotional Demands</b>	<p>Emotional demands are those arising from contacts or work with other people. For instance, those who are angry, difficult, upset or unwell; or in circumstances such as to cause stress to the jobholder, for example, if the people are terminally ill, very frail, at risk of abuse, homeless or disadvantaged in some other way</p> <p><b>Questions to help you understand the factor:</b></p> <ol style="list-style-type: none"><li>1. Do you come into contact with a person disadvantaged or distressed by their personal circumstances or those of a close relative?</li></ol>
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**MATCHED Role Profile statement:**

Does your job involve contact (in person or by telephone) with people who by their circumstances or behaviour (for example homelessness, mentally ill, terminally ill) cause you emotional stress or upset? People can include the public, service users (including pupils) or other employees of the organisation, but not your immediate work colleagues.

**Y / N**

If YES, please describe the cause, the people it may involve and the frequency:

What other Emotional demands are there for the role?	How often do you experience this demand	What is the duration?
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<b>Responsibility for People Wellbeing</b>	<p>Responsibility for people, which includes responsibilities for the physical, mental, social, economic and environmental well being of any people, other than employees supervised or managed by you.</p> <p><b>Questions to help you understand the factor:</b></p>
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	<ol style="list-style-type: none"> <li>1. Do you have responsibility for individuals or groups of people who are not members of employees e.g. members of the public, parents and pupils or for members of employees as customers?</li> <li>2. Does the role have a DIRECT (hands on) impact on the well-being of individual, or groups of, people?</li> </ol>
<b>MATCHED Role Profile statement:</b>	
<p>Do you undertake any tasks or duties that have a direct impact on people?  <b>Y / N</b>          If yes, please describe the task and who would benefit.</p>	
<p>Are any people reliant, i.e. personally dependent, on you for their care and welfare?  <b>Y / N</b>          If yes, please provide the group of reliant people and how they might benefit?</p>	
<p>Do you implement, or enforce (i.e. have formal responsibility for initiating prosecution against failures to comply) any Statutory Regulations which have a direct impact on the health, safety or wellbeing of people?  <b>Y / N</b>          If yes, please provide an example:</p>	
<p>What other responsibilities for people, including health and safety are there for the role?</p>	
<b>Responsibility for Supervision/ Direction/Co-ordination of employees</b>	Responsibility for training, supervision, co-ordination or management of employees, or others in an equivalent position.

	<p><b>Questions to help you understand the factor:</b></p> <ol style="list-style-type: none"> <li>1. Are you directly responsible for other members of employees?</li> <li>2. What DIRECT (hands on) responsibility does the role holder have for the supervision, co-ordination or management of employees, or others in an equivalent position?</li> </ol>
<p><b>MATCHED Role Profile statement:</b></p>	
<p>Does your role involve demonstrating your own duties, giving advice and guidance or training other employees?  <b>Y / N</b>  If <b>YES</b>, please provide an example</p>	
<p>Does your role directly involve the supervision, co-ordination or management of employees or others in an equivalent position?  <b>Y / N</b>  If <b>YES</b>, please describe the management/supervision of employees required for the role:</p>	
<p>What other responsibilities does this role hold, which impact on staff even though there is no direct managerial or supervisory relationship?</p>	
<p><b>Responsibility for Financial Resources</b></p>	<p>Responsibility for financial resources including cash, cheques, debits and credits, invoices, budgets and income, business planning and long term development of financial resources.</p> <p><b>Questions to help you understand the factor:</b></p> <ol style="list-style-type: none"> <li>1. Are you directly responsible for financial resources, including handling of cash and cheques, being accountable for a budget, or accounting for sums of money?</li> </ol>

	2. What DIRECT (hands on) responsibility for financial resources, including budgets, accounting for expenditure or the administration of invoices etc. is required for this role?
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**MATCHED Role Profile statement:**

Are you directly responsible for financial resources?  
**Y / N**  
 If YES, please provide details of the type of financial responsibility, the value and the nature of the impact.

Do you have any other responsibilities that focus on the authority’s financial policies or well being? For example for developing financial policies and procedures or for providing advice, guidance or interpretation of policies or procedures (only include within this answer a responsibility which has as its main focus the authority’s financial policies or well being)

If YES, please specify:

What other financial responsibility is required for the role?

<b>Responsibility for Physical and Information Resources</b>	Responsibility for Physical Resources Covers all Physical Resources  <b>Questions to help you understand the factor:</b> <ol style="list-style-type: none"> <li>1. Do you have direct responsibility for physical resources including buildings, plant and equipment as well as computerised information, data or records?</li> <li>2. What DIRECT (hands on) responsibility for physical resources (IT systems, equipment or tools, buildings, supplies or stocks, and personal possessions of others) is required for this role?</li> </ol>
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**MATCHED Role Profile statement:**

Are you responsible for any manual or computer information?

**Y / N**

If **YES**, please describe the nature of the information and how often you have access to it.

Do you adapt, design or develop any information systems?

**Y / N**

If **YES**, please describe the type of system, how the role is required to adapt it and how often?

What other office or other equipment, tools or instruments, or vehicles, plant and machinery are required for use in the role?

Are you responsible for the cleaning, maintenance or repair of buildings, external creations or equivalent?

**Y / N**

If yes, please describe the building/site, the nature of the responsibility and how often:

Are you responsible for the security of any buildings, external locations or equivalent?

**Y / N**

If yes, please describe the building/site, the nature of the responsibility and how often:



Do you order or control the stock of any equipment or supplied?

**Y / N**

If yes, please describe the equipment, the value and how often:

Are you responsible for any personal possessions of others?

**Y / N**

If yes, please describe the detail of the personal possession, the nature of the responsibility and how often:

What other form of responsibility for physical resources, for example, developing policies or procedures in relation to physical resources, or providing advice, guidance or interpretation of policies and procedures is required for the role?

**Working Conditions**

Exposure in your job to disagreeable, uncomfortable or hazardous working conditions arising from the environment or from working with people.

**Questions to help you understand the factor:**

1. What are the conditions in which you work that are an unavoidable part of your job, assuming Health & Safety regulations have been met?
2. What exposure to unpleasant working conditions, for example dirt, dust, heat and cold is the role subject to?

**MATCHED Role Profile statement:**

What kind of places do you normally work in? (e.g. office, clients' homes, public library, council parks and gardens, vehicle). Give approximate % of time:

Do you experience any unpleasant environmental working conditions? (e.g. dust, dirt, temperature extremes and variations, humidity, noise, vibration, fumes, smells, steam, smoke, grease, oil, confined spaces, cramped conditions)?

**Y / N**

If yes, please describe the conditions:

Do you experience any verbal abuse, aggression or other anti-social behaviour from people (other than your immediate work colleagues)?

**Y / N**

If yes, please describe:

Do you encounter any hazards in your job?

**/ N**

If yes, please describe:

**Y**

Do you encounter any other disagreeable or unpleasant working conditions in your job?

**Y / N**

If yes, please describe:

Do you wear any form of protective clothing to carry out your job?

**/ N**

If yes, please describe:

**Y**