The purpose of this questionnaire is to provide additional key information about a job. It should not duplicate information contained in the Role Profile. Information must relate to the post and not the person(s) currently in the post. Both the postholder and the manager must sign in agreement before it will be accepted to evaluate. An up to date Role Profile, Person Specification and Organisation Chart are also required.

|  |  |
| --- | --- |
| Job Title  |  Insert the title of the job you want evaluated  |
| School | Click or tap here to enter text. |
| Name and Grade of Direct Line Manager | Insert the name and grade of the line manager of the post to be evaluated |
| Current Grade of Post to be evaluated | Insert the grade currently being paid for the job to be evaluated |
| Postholder name | Please provide the name of the current post holder. If this is a new post please enter NEW. If the post is vacant then please enter VACANT.  |
| Provide a sentence or two, summarising the overall duties of the post to be evaluated.  | Click or tap here to enter text. |

1. **Supervision/Management of People**

Please enter the name, job title and grade of all people who will be supervised/managed by the post that is being evaluated

|  |  |  |
| --- | --- | --- |
| NAME | JOB TITLE | GRADE |
| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |
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1. How many staff are managed directly by the post being evaluated? Enter number
2. Will the postholder have full management responsibility? Click or tap here to enter text.

(e.g. responsibility for attendance, performance management, discipline, training, sickness management?

1. How many groups of staff are fully managed*?*  Enter number *(a group must be at least 2 people)*
2. How many staff do they only supervise, e.g. checking work, issuing

daily priorities, booking annual leave? Include Agency & Contract workers. Enter number

1. Do they sometimes deputise for a manager? YES[ ]  NO[ ]

If YES, how often? Click or tap here to enter text.

1. Does this post lead any project teams? YES[ ]  NO[ ]

If YES, for how long and how often do they have this authority Click or tap here to enter text.

1. Does the postholder have to visit other locations to manage

their staff? YES[ ]  NO[ ]

1. **CREATIVITY AND INNOVATION**
2. In which areas of work does the postholder need to be original / innovative/ creative? (the extent of problem solving / communication / presentation, policy development, case work, counselling, design of training courses, etc.

To what extent is the postholder regulated by procedures? Do they follow guidelines, procedures or systems? Do they have to think of solutions or new responses to issues?

Click or tap here to enter text.

1. **CONTACTS AND RELATIONSHIPS**
2. With whom does the postholder interact on a regular basis and why?

Please indicate the job titles, internal / external organisations and whether the purpose is for advising, fact-finding, interviewing etc., and the frequency of the interactions.

Click or tap here to enter text.

1. Does the postholder represent or negotiate on behalf of the School? YES[ ]  NO[ ]

If YES, how often? Please give details below.

Click or tap here to enter text.

1. **DECISIONS - (DISCRETION)**
2. What decisions does this position have to make and what kind of choices of action are available? What authority does this individual have, other than the order work is to be completed? What is the nature of the decisions, are several options available? How much autonomy do they have? Do they have to ask their line manager before making a decision?

 Click or tap here to enter text.

1. Do they have to make ‘on the spot decisions’ with no access to advice? YES[ ]  NO[ ]
2. Does the postholder review policies/procedures/working standards? YES[ ]  NO[ ]

**DECISIONS - (CONSEQUENCES)**

1. What is the impact of these decisions, who do they affect, do they affect a service as a whole? What is the effect of these decisions on individuals? Does this role have an effect on changing the way a service is delivered or reviewing ta system of work?

Click or tap here to enter text.

1. If this position has a **significant** impact on the service, School, or individuals please explain in more detail

Click or tap here to enter text.

1. **RESOURCES**

Is the postholder **continuously** (not occasionally) **solely accountable** for the safekeeping or repair, maintenance, etc. of any School physical or financial resources outside of a security protected environment? **Note: Budgets do not count**

Are they in charge of materials, equipment or a vehicle? If so, how much is it worth?

Ensure you enter an approximate value at one point in time, not an overall annual amount.

|  |  |  |  |
| --- | --- | --- | --- |
| X | ITEM | VALUE UP TO £ | COMMENTS |
|[ ]  Cash (amount responsible for at one time) | £  | Click or tap here to enter text. |
|[ ]  Cheques (ONLY if open, not paid to the school or a named individual etc.)  | £  | Click or tap here to enter text. |
|[ ]  Other: client valuables, stamps | £  | Click or tap here to enter text. |
|[ ]  Hand tools e.g. plumbing, carpentry etc. | £  | Click or tap here to enter text. |
|[ ]  Small equipment e.g. mobile phone, laptop | £  | Click or tap here to enter text. |
|[ ]  Large plant, vehicle, machinery | £  | Click or tap here to enter text. |
|[ ]  Major physical resources e.g. the school (has overall responsibility for security, maintenance (**not just one of several key holders or senior management**) | £  | Click or tap here to enter text. |

1. **WORKING ENVIRONMENT – WORK DEMANDS**
2. What deadlines, if any, have to be met in the job? How tight/ flexible are these deadlines e.g. reports, statutory requirements?

Click or tap here to enter text.

1. To what extent is the postholder able to complete what they have planned to do, on a daily basis? Click or tap here to enter text.

What tasks dictate that the postholder has to ‘drop everything’ to complete. Click or tap here to enter text.

How often do interruptions occur? Click or tap here to enter text.

What kind of interruptions are they? Click or tap here to enter text.

Does the postholder need to go out of the office regularly? YES[ ]  NO[ ]

If so, for what purpose and how often does this happen? Click or tap here to enter text.

Do they report to more than one manager? YES[ ]  NO[ ]

 Please provide details below

 Click or tap here to enter text.

1. **WORKING ENVIRONMENT – PHYSICAL DEMANDS**

Does this position require the individual to exert any more than normal levels of physical effort? For example, a caretaker may gain additional points here because they do a very physical job.

Please complete the table below

|  |  |  |  |
| --- | --- | --- | --- |
| Activity | Frequency- Check one box | Effort required – Check one box | Comment |
|  | Short periods | Lengthy periods | Normal | Substantial | Intense |  |
| Use of keyboard |[ ] [ ] [ ] [ ] [ ]  Click or tap here to enter text. |
| Other manual dexterity |[ ] [ ] [ ] [ ] [ ]  Click or tap here to enter text. |
| Standing/walking |[ ] [ ] [ ] [ ] [ ]  Click or tap here to enter text. |
| Bending/stretching |[ ] [ ] [ ] [ ] [ ]  Click or tap here to enter text. |
| Lifting/pulling/pushing |[ ] [ ] [ ] [ ] [ ]  Click or tap here to enter text. |
| Use of ladders etc. |[ ] [ ] [ ] [ ] [ ]  Click or tap here to enter text. |
| Other:Click or tap here to enter text. |[ ] [ ] [ ] [ ] [ ]  Click or tap here to enter text. |

If you have answered substantial or intense, please provide more detail in the comments column or in the box below.

Click or tap here to enter text.

1. **WORKING ENVIRONMENT – WORKING CONDITIONS**

Where does the job require the postholder to work? Additional points are available if they work outside or if their working conditions are noisy or unpleasant. For example, roadworkers and morticians would score highly here. Travelling to other locations is not recognised.

|  |  |  |  |
| --- | --- | --- | --- |
| Conditions | Sometimes (%) | Always | Comment |
| Heated, lit, ventilated room  | Click or tap here to enter text. |[ ]  Click or tap here to enter text. |
| Outside | Click or tap here to enter text. |[ ]  Click or tap here to enter text. |
| Other: Click or tap here to enter text. | Click or tap here to enter text. |[ ]  Click or tap here to enter text. |
| Exposure to moderate noise | Click or tap here to enter text. |[x]  Click or tap here to enter text. |
| Exposure to considerable noise | Click or tap here to enter text. |[ ]  Click or tap here to enter text. |
| Exposure to moderate heat/cold | Click or tap here to enter text. |[ ]  Click or tap here to enter text. |
| Exposure to considerable heat/cold | Click or tap here to enter text. |[ ]  Click or tap here to enter text. |
| Moderately dirty surroundings | Click or tap here to enter text. |[ ]  Click or tap here to enter text. |
| Considerably dirty surroundings | Click or tap here to enter text. |[ ]  Click or tap here to enter text. |
| Moderately unpleasant conditions | Click or tap here to enter text. |[ ]  Click or tap here to enter text. |
| Considerably unpleasant conditions  | Click or tap here to enter text. |[ ]  Click or tap here to enter text. |

1. **WORKING ENVIRONMENT – WORK CONTEXT**

What are the potential risks to personal safety that arise from performing these duties? Can they call upon the support of colleagues if necessary? Are there occasions where the postholder is at a real risk of injury or illness? Do they have to deal with a lot of angry individuals?

|  |  |  |
| --- | --- | --- |
| Type of risk | Level of Risk | Source of injury |
|  | Minimal | Some | Moderate | Substantial | Environment | Client/public |
| Personal injury |[ ] [ ] [ ] [ ] [ ] [ ]
| Illness or health |[ ] [ ] [ ] [ ] [ ] [ ]
| Injury from client /public |[ ] [ ] [ ] [ ] [ ] [ ]
| Emotional injury |[ ] [ ] [ ] [ ] [ ] [ ]
| Other: Click or tap here to enter text. |[ ] [ ] [ ] [ ] [ ] [ ]

If you have answered Some, Moderate or Substantial please provide details below

Click or tap here to enter text.

**NB: A risk assessment should have been made and any precautions/ recommendations should be in place.**

1. **KNOWLEDGE & SKILLS**

Which of the following would you say reflects the knowledge and skills and tasks required to perform this position? Please check all which apply

|  |  |
| --- | --- |
| Limited range of tasks easily carried out after induction  | [ ]  |
| Tasks involving easily understood rules, procedures / techniques | [ ]  |
| Standard of practical knowledge and skill in that area. | [ ]  |
| Range of advanced tasks in one discipline | [ ]  |
| Range of advanced tasks in more than one function or specialist discipline | [ ]  |
| Complex work and the School’s expert on a specialist discipline | [ ]  |
| More complex work and expert in at least 3 specialist disciplines  | [ ]  |
| Highly complex, strategic and diverse work in a whole range of specialist disciplines | [ ]  |

Please define the functions performed by the postholder (e.g. cleaning, data input, data management, people management, budget management, administration, customer service etc.) and the breadth and depth of knowledge of specialist disciplines (e.g. law, finance, engineering, social work, IT, procurement, planning, etc. required, indicating what qualifications are a **statutory requirement** to do the job.

|  |  |
| --- | --- |
| Type of Knowledge/Skill needed | Depth of knowledge needed (e.g. basic ability, working knowledge, the School’s expert etc.) |
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**DECLARATION**

I agree that this questionnaire is a fair and accurate statement of the requirements of the job to be evaluated:

Name: Click or tap here to enter text. (Postholder) (if not a NEW or VACANT post)

Date: Click or tap here to enter text.

(NB: Where there is more than one postholder, only one needs to agree on behalf of all post holders)

Signed: Click or tap here to enter text. (Line Manager)

Date: Click or tap here to enter text.