

# Brooke Weston Trust – Job Families

## Job Evaluation Questionnaire

### Job title

Site Manager (secondary)

### General Questions

Please describe in one or two sentences the purpose of your job?

Responsible for the security of the premises and related health and safety, maintenance and cleaning within the school thereby ensuring the school remains open, safe and compliant.

What are the main tasks/duties/responsibilities of your job?

Strategic planning	<b>% of time</b>
Communicating with stakeholders	
Carrying out repairs and maintenance	
Supporting school day operations	
Liaising with and coordinating contractors	
Transport coordination and management	
Ensuring the safety, compliance, health and safety and functionality of estate	
Administration, including procurement and compliance issues	

Roughly, what percentage of time do you spend on each?

	Main tasks/duties/responsibilities	% of time
1	Strategic planning Communicating with stakeholders	5% 5%
2	Carrying out repairs and maintenance Supporting school day operations	10% 15%
3	Liaising with and coordinating contractors Transport coordination and management	20% 5%
4	Ensuring the safety, compliance, health and safety and functionality of estate	25%
5	Administration, including procurement and compliance issues	15%

Are there any tasks/duties which you do occasionally, or at a certain time of the year? If yes, please list and state how often you do them.

	Occasional tasks	How often you do them
1	Driving students and vehicle preparation	1 x term
2	Snow clearing / gritting	5-10 per year (variable)
3	Cleaning	1 x week
4		

1. What knowledge is needed to be able to do your job properly under the listed headings and how is the knowledge normally acquired?		
Type of knowledge	What knowledge needed and for what purpose	How normally acquired
E.g. Procedural	Processing an order for stationery	On the job instruction and experience – minimum 1 year
(1) Literacy and numeracy	<b>Strong knowledge to interpret and write/prepare reports and financial information to make informed judgements and decisions</b>	<b>Minimum GCSE or equivalent</b>
(2) Procedural (e.g. procedures instructions for carrying out tasks)	<b>Strong knowledge of broad range of procedures that allow whole school sites to remain open, safe and compliant, including PPE maintenance and H&amp;S regulations</b>	<b>NEBOSH, COSHH, CDM regulations – acquired via mix of on job training and accredited courses</b>
(3) Equipment (e.g. machines, tools, instruments)	<b>Good knowledge for safe operation and effective/efficient use of PPE, hand tools and measuring/recording equipment</b>	<b>Experience / on job training/ manufacturers recommended courses/manuals</b>
(4) Administrative systems	<b>Working knowledge of school administration systems for effective communication and planning</b>	<b>On Job training</b>
(5) Organisational (e.g. own and other sections/departments), including arrangements and policies	<b>Good management knowledge to ensure premises team can operate effectively within school day and can appropriately guide team/colleagues</b>	<b>On Job training</b>
(6) Specialist (e.g. finance, IT, social work), including practical, theoretical and conceptual knowledge	<b>Good knowledge of specialist plant, installations and systems including BMS, KyKloud &amp; PSFinancials to allow the efficient management and use of resources</b>	<b>Bespoke training as offered by system suppliers or on job training</b>
(7) Other languages and cultures	<b>No specific knowledge required, but a general awareness and appreciation of other cultures and languages important in order to positively promote diversity and equality</b>	<b>On job training</b>
(8) Other, please specify	<b>Good knowledge of site property, plant and equipment, including understanding of Occupation and Maintenance manuals in order to coordinate swift and efficient repairs.</b>	<b>On job training and induction</b>



## Mental Skills

This measures what analytical, problem solving and judgement skills you need to do the job. It also looks at creativity and development skills, design, handling people, developing policies and procedures and planning and strategy.

1. In the boxes below, give 2 examples of decisions or recommendations you make, or problems you solve, on a day to day, or regular, basis.

Example 1

**Determine the cause of an identified issue that requires attention and identify potential solutions and decide on most appropriate action for long term efficiency and effectiveness (e.g. a broken item).**

Example 2

**Managing expectations of school wide colleagues and ensuring that people are appraised of Premises Team plans that may impact on other school activities. Prioritising workload to minimise impact on teaching and learning.**

2. In the box below, give an example of the most difficult or important decisions or recommendations you make or problems you solve.

**Recommending to close the school on grounds of health and safety and/or an identified risk.**

How often do you expect to take a decision or solve a problem of this type (e.g. once a month, twice a year?)

1 times per year

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

No  Go to the next question Yes  Give an example in the box below:

Example of decision / recommendation / problem:

**Deciding whether the continued use of shower systems is safe and appropriate**

Indicate nature and complexity of information / situation:

**Reports from water analysis testing need to be interpreted by applying the report data to guidelines/benchmarks to identify safe use. This involves applying data to national standards/guidelines.**

How do you interpret or analyse the information / situation?

**This involves reading a written report, comparing with published standards and deciding if safe of not to use system depending on whether readings are above or below set thresholds.**

4.	What are the requirements of your job for creative or developmental skills (in the broadest sense e.g. designing a page layout, working out how to deal with a difficult client, drawing up a new policy or procedure?)		
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		
2	The work requires creative skills for solving straightforward problems		
1	The work requires creative and developmental skills for solving varied problems		
3	The work requires creative and developmental skills for solving difficult problems		
4	The work requires creative and developmental skills for producing innovative solutions to major problems.		
Give an example for the option you have marked 1, as being most typical			
<b>Developing internal operational policy and procedures appropriate to needs of the school infrastructure or operations</b>			
5.	Does your work require you to plan ahead or organise for the future?		
No <input type="checkbox"/>	Go to the next question		
Yes <input checked="" type="checkbox"/>	What period do these planning/organising activities mainly cover? (NB: please note the period over which planning activities take place, not the time-scale for what is planned)	Short term (days, up to weeks) Medium term (months, up to a year) Long term (more than a year)	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>
Please give a typical example below:			
<b>Preparing and maintaining, on an ongoing basis, strategic plans and maintenance schedules</b>			
6.	Are any other forms of mental skill required for your job? If so, please list them below and explain what purposes you require them for.		
Mental Skill		Purpose required for	

## Interpersonal and communication skills

This factor looks at the context, complexity and nature of the subject matter to be communicated; and the context, form, process and potential difficulty of the actual interaction with the recipient(s).

<b>1.</b>	Tick the boxes below to show which forms of interpersonal and communication skills are needed for your job. Say what each is used for and with whom they are used.	
Form of skill		Used for and with whom
<i>Example: Caring Skills</i>	<input checked="" type="checkbox"/>	Providing personal services to clients in their homes
<i>Example: Caring Skills</i>	<input checked="" type="checkbox"/>	Assessing client's care needs
<i>Example: Negotiating Skills</i>	<input checked="" type="checkbox"/>	Negotiating tender contract details
Caring skills	<input type="checkbox"/>	
Training skills	<input checked="" type="checkbox"/>	<b>Use of equipment, basic instructions, manual handling, fire procedures with whole school</b>
Team working skills	<input checked="" type="checkbox"/>	<b>With immediate team to get work done and wider colleagues for planning &amp; coordinating</b>
Motivational/team leading skills – includes own staff	<input checked="" type="checkbox"/>	<b>With immediate team to ensure al work completed and colleagues go 'above &amp; beyond'.</b>
Advising, guiding skills	<input checked="" type="checkbox"/>	<b>Explaining risks and ensuring policies adhered to with school wide colleagues</b>
Persuading, influencing skills	<input checked="" type="checkbox"/>	<b>Ensuring that procedures are followed and implemented (immediate team and others)</b>
Counselling skills	<input type="checkbox"/>	
Conciliating skills	<input type="checkbox"/>	
Advocacy skills	<input type="checkbox"/>	
Negotiating skills	<input checked="" type="checkbox"/>	<b>With contractors re. prices/contract terms/deadlines and quality of work etc</b>
Oral (spoken) communication skills	<input checked="" type="checkbox"/>	<b>With all stakeholders/building users to maintain professional standards &amp; reputation</b>
Written communication skills	<input checked="" type="checkbox"/>	<b>With all stakeholders/building users to maintain professional standards &amp; reputation</b>
Oral presentation skills	<input checked="" type="checkbox"/>	<b>Fire safety training, Governor meetings etc. – with range of colleagues</b>
Other interpersonal or communication skills	<input type="checkbox"/>	
<b>2.</b>	Are you required to use a language (oral or written) other than English?	
No	<input checked="" type="checkbox"/>	Go to the next question
Yes	<input type="checkbox"/>	Complete the table below
Language	Used to communicate with.	Used for.

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**3.** Are you required to use any form of recognised sign language?

No  Go to the next section – Physical Skills

Yes  Complete the table below

Form of sign language	Used to communicate with	Used for

## Physical skills

This measures the physical skills required to do the job, including finger dexterity, hand-eye co-ordination of limbs and sensory co-ordination.

<b>1.</b>	Tick 1 box to indicate the keyboard skills needed for your job:		
Required		Used for.	
Not required, or 2-finger operation with no time constraints	<input type="checkbox"/>		
Precision required, keyboard used for some aspects of work	<input checked="" type="checkbox"/>	<b>Policy/procedure writing, data recording and presentation, email (internal and external)</b>	
Precision and speed, keyboard skills integral to main duties	<input type="checkbox"/>		
Considerable precision and speed, keyboard skills e.g. for data input	<input type="checkbox"/>		
<b>2.</b>	Tick 1 box to indicate whether driving skills are needed for your job, and state the nature and complexity of the vehicle driven.		
Required		Nature of Vehicle	Purpose of driving
Not required (other than for driving to and from work)	<input type="checkbox"/>		
Normal driving skills e.g. for travel between work locations	<input checked="" type="checkbox"/>	<b>Cars, vans, minibuses</b>	<b>Transporting students and goods</b>
Other driving skills e.g. for specialist vehicles/plant	<input type="checkbox"/>		
<b>3.</b>	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)?		
No	<input type="checkbox"/>	Go to the next section – Initiative and Independence	
Yes	<input checked="" type="checkbox"/>	Complete the table below	
Skill	Used for	Precision / Speed	
E.g. Dexterity	Peeling, chopping vegetables	Economical use, portion control, restricted time	
<b>Dexterity and hand/eye coordination</b>	<b>Use of mechanical, electrical, electronic devices – repairs and maintenance</b>	<b>Safe control and appropriate use</b>	
<b>Balance</b>	<b>Working at heights, using ladders</b>	<b>Safe control and use</b>	
<b>Visual perception</b>	<b>Accessing all areas building safely</b>	<b>Identification and avoidance of hazards, e.g. ice on roof</b>	

## Initiative and Independence

This factor looks at how independent you have to be within your job. This 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 their own or with others.

<b>1.</b>	How do you know what you should be doing each day? Explain briefly below:		
<b>Reactive work – responding to requests</b> <b>Timetabled activities for school day operations and set tasks (unlocking etc)</b> <b>Self-planned work – prioritising own schedule to achieve all required outcomes</b> <b>Interpreting and implementing Trust, School and national policies, legislation and guidance documents</b>			
<b>2.</b>	What instructions, procedures, policies, legislation, govern you work? Explain briefly below:		
<b>Internal (school &amp; BWT) policies and procedures (e.g. procurement policy)</b> <b>Legislation (e.g. Health &amp; Safety at work Act 1974)</b> <b>EFA guidance documents</b>			
<b>3.</b>	Give 2 examples of problems or decision you would deal with yourself, without reference to a supervisor or manager.		
Example 1			
<b>Stock control – all consumables for cleaning and general site maintenance</b>			
Example 2			
<b>Management and deployment of staff, including annual leave etc.</b>			
<b>4.</b>	Give 2 examples of problems or decisions you would refer to your supervisor or manager:		
Example 1			
<b>Major expenditure, outside of allocated budget for non-routine maintenance.</b>			
Example 2			
<b>Decision to close or restrict access to an area of the school building/premises.</b>			
<b>5.</b>	What form(s) of direction, management or supervision do you receive, from whom and how often?		
	Form of direction etc.	From whom (job title)	How often (times per week)
	E.g. Regular team meetings	Supervisor – Senior Social Worker	Every 2 weeks

<b>Annual appraisal</b>	<b>Line Manager</b>	<b>Annually</b>
<b>Principal meetings</b>	<b>Principal (other allocated line manager)</b>	<b>Monthly</b>
<b>Informal site walks</b>	<b>Line Manager</b>	<b>Weekly</b>

## Physical Demands

This question establishes the normal physical demands which are placed on anyone doing the job.

<b>1.</b>	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, standing at a drawing board)?				
No	<input type="checkbox"/>	Go to the next question			
Yes	<input checked="" type="checkbox"/>	For what purposes?	<b>Use of computer</b>		
		How long do you have to maintain this position at any one time?	<b>30 minutes</b>		
		And how often?	<b>4</b>	times per	<b>day</b>
<b>2.</b>	Does your job involve any other physical demands?				
No	<input type="checkbox"/>	Go to the next section – Mental Demands			
Yes	<input checked="" type="checkbox"/>	Go to the next question			
<b>3.</b>	Does your job require periods of standing and walking beyond normal movement between indoor working area?				
No	<input checked="" type="checkbox"/>	Go to the next question			
Yes	<input type="checkbox"/>	For what purposes?			
		How long are these periods of standing and walking?			
		And how often do they occur?		times per	
<b>4.</b>	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)?				
No	<input type="checkbox"/>	Go to the next question			
Yes	<input checked="" type="checkbox"/>	Complete the table below:			
What and why		How heavy	How far	For how long	How often % working time
E.g. bucket of water, for floor washing		5 kg?	50m (up flight of stairs)	5 mins	1 per day – 2%
Furniture (chairs/tables)		5kg	50m	40min	1 per day
General portorage		5kg	300m	5min	5 per day
Ladders		10kg	300m	5min	1 per day
Large ladders		25kg	300m	5min	1 per month
<b>5.</b>	Does your job require pushing and/or pulling of items or equipment?				

No	<input type="checkbox"/>	Go to the next question			
Yes	<input checked="" type="checkbox"/>	Complete the table below:			
What and why		How heavy	How far	For how long	How often % working time
<b>Pallets of paper</b>		<b>500kg</b>	<b>100m</b>	<b>10min</b>	<b>1 per week</b>
<b>Goal posts (or similar)</b>		50kg-	<b>100m</b>	<b>5min</b>	2 per week
<b>Astroturf machine (assisted)</b>		200kg 100kg	<b>1km</b>	<b>1 hour</b>	5 per year
<b>Carpet cleaners/buffers</b>		<b>25kg</b>	<b>1km</b>	<b>1 hour</b>	<b>5 per year</b>
<b>6.</b>	Does your job require rubbing, scrubbing, digging or similar form of physical effort?				
No	<input type="checkbox"/>	Go to the next question			
Yes	<input checked="" type="checkbox"/>	Which of these, and for what purposes?		<b>Dig out drainage ditches to clear of debris/build up, scrubbing the floors and stair treads</b>	
		How long at any one time do you rub and/or scrub, dig or similar?		<b>3 hours</b>	
		And how often?		<b>2 per year</b>	
<b>7.</b>	Does your job require working in an awkward position (e.g. crouching, kneeling)?				
No	<input type="checkbox"/>	Go to the next question			
Yes	<input checked="" type="checkbox"/>	Complete the table below:			
Position		Why	For how long	How often % working time	
E.g. Kneeling		To scrub kitchen floor	20-30 mins	1 per day – 10%	
Kneeling		Access to under counter areas	30 mins	2 per week	
Crouching		Accessing plant in tight spaces	30 mins	2 per week	
<b>8.</b>	Does your job involve any other form of physical demand?				
Physical demand		Why	For how long	How often % working time	

## Mental Demands

This looks at the degree and frequency of your concentration, alertness and attention to detail required by your job.

<b>1.</b>	Does your job 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)?			
No	<input type="checkbox"/>	Go to the next question		
Yes	<input checked="" type="checkbox"/>	Complete the table below:		
Form of sensory attention		Needed for	For how long	How often % working time
E.g. Visual & listening attention		Watching children at play	Average 2 hours	Once a week – 5%
Visual		Identification of hazards	Ongoing (whenever away from desk)	Ongoing
<b>2.</b>	Does your job require more than general mental attention or concentration (e.g. more than general mental attention for repeated manual calculations, drafting a complex report)?			
No	<input type="checkbox"/>	Go to the next question		
Yes	<input checked="" type="checkbox"/>	Complete the table below:		
Form of mental concentration		Needed for	For how long	How often % working time
E.g. Totalling and tallying receipts		Balancing cash office accounts	30 mins (if tallies) to 1 hour	Twice per day – 20%
Checking invoices, reviewing tender returns, checking pricing.		Awarding contracts / procurement processes	1 hour	1 per week
Calculating overtime hours due for team		Payroll process	1 hour	1 per month
Mental concentration		Diagnosing issues with buildings management system	up to 1 hour	as and when required
<b>3.</b>	Is your job subject to work-related pressures e.g. regular deadlines, frequent interruptions, conflicting demands?			
No	<input type="checkbox"/>	Go to the next question		

Yes <input checked="" type="checkbox"/>	Complete the table below:		
Form of work related pressure	Source	For how long	How often % working time
E.g. Telephone interruptions (e.g. to clerical tasks)	Suppliers, other staff	2-20 mins per call	10-20 times per day
<b>Regular deadlines</b>	<b>Routine checks &amp; compliance measures</b>	<b>Variable</b>	<b>Weekly</b>
<b>Conflicting demands / interruptions</b>	<b>Broad responsibility set (proactive and reactive nature of job)</b>	<b>Variable</b>	<b>Daily</b>
<b>4.</b>	Does your job involve any other form of mental demand?		
No <input checked="" type="checkbox"/>	Go to the next section – Emotional Demands		
Yes <input type="checkbox"/>	Complete the table below:		
Mental Demand	Source	For how long	How often % working time
<b>Stress</b>	<b>Staff</b>	<b>Variable</b>	<b>Daily</b>

## Emotional Demands

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.

1. 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.



Yes

Please give examples.



No

2. These people – who are they?

Cause of emotional stress or upset

Frequency of stress (daily/monthly/etc.)

Pupils & parents

Antisocial / abusive behaviours

1 x month

3. Does your job involve any other form of emotional demand?

No



Go to the next section – Responsibility for People

Yes



Complete the table below:

Emotional Demand	Why	For how long	How often

## Responsibility for People – Wellbeing

This factor measures any job responsibilities which have a DIRECT (hands on) impact on the well-being of individual, or groups of, people.

<b>1.</b>	Do you undertake any tasks or duties which have a direct impact on people?		
No	<input type="checkbox"/>	Go to the next section – Responsibility for Supervision/Direction/Co-ordination of Employees	
Yes	<input checked="" type="checkbox"/>	Complete the table below:	
Task / Duty		Who benefits	How people benefit
E.g. Preparing and serving meals		Pupils and staff	Regular nutritious meals maintaining health of pupils and staff
Maintaining building		Pupils, staff and community customers	Use of a safe and clean working/learning environment
Completing risk assessments		Pupils, staff and community customers	to ensure all activities and individuals within the site and buildings follow safe procedures and practices to comply with legal obligations
<b>2.</b>	Are any people reliant, i.e. personally dependent, on you for their care and welfare?		
No	<input checked="" type="checkbox"/>	Go to the next question	Yes <input type="checkbox"/> Complete the table below:
Reliant people (who benefit)		Needs of reliant people (how people benefit)	What done for reliant people (task/duty)
E.g. SEN students		Physical and social support	Food preparation, bathing, and talking to students including assessing their needs and state of health.
<b>3.</b>	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?		
No	<input type="checkbox"/>	Go to the next question	Yes <input checked="" type="checkbox"/> Complete the table below:
(A) Implement	Who direct impact on		Nature of impact

E.g. Implement food regulations	People eating in public places	Ensuring health of people through maintenance of food hygiene standards
<b>Maintaining safe access and egress (fire safety regulations)</b>	<b>All building users</b>	<b>Use of a safe environment</b>
<b>Legionella testing</b>	<b>All building users</b>	<b>Use of a safe environment and prevention of disease</b>
(B) Enforce	Who direct impact on	Nature of impact
<b>Breaches of health and safety policy/best practice (request that behaviour is amended in first instance but escalate if not done)</b>	<b>All building users</b>	<b>Maintaining safe environment for all by removing hazards</b>
<b>4.</b>	Do you have other responsibilities, not listed above, which impact on the wellbeing of people? For example development of policies or providing advice, guidance or interpretation of procedures or regulations which impact on the wellbeing of people. (Only include within this answer any responsibility that has as its main focus the wellbeing of people.)	
Responsibility	Nature of Impact	Who impact on
<b>5.</b>	Do you have any other responsibilities for people, including health and safety?	
Other responsibilities	Who benefits	How benefit
<b>Preparing internal policies and procedures (school level)</b>	<b>Building users</b>	<b>Safe practice adopted across school site</b>
<b>Contribute to staff induction</b>	<b>colleagues</b>	<b>Understanding of relevant H&amp;S information</b>
<b>Responsibility for Supervision/Direction/Coordination of Employees</b>		

This factor measures the DIRECT (hands on) responsibility of the job holder for the supervision, co-ordination or management of employees, or others in an equivalent position.

<b>1.</b> Does your job involve demonstrating your own duties, giving advice and guidance or training other employees?			
No <input type="checkbox"/>	Go to the next question		Yes <input checked="" type="checkbox"/> Complete the table below:
Whom (Job Groups)	What (i.e. demonstrating, guiding, training)	How often	
<b>Team, including cleaning team</b>	<b>Demonstrating, guiding and training for suitable use of equipment and expected output standards</b>	<b>1 x month</b>	
<b>2.</b> Does your job directly involve the supervision, co-ordination or management of employees or others in an equivalent position?			
No <input type="checkbox"/>	Go to the next section – Responsibility for Financial Resources		
Yes <input checked="" type="checkbox"/>	List below the employees/supervised/co-ordinated/managed, their job group and types of work and enter appropriate responsibility and location codes.		
Responsibility Codes:	<b>1</b> = Regular instructions <b>2</b> = Regular checking work <b>3</b> = Regular allocation of work <b>4</b> = Organisation of work <b>5</b> = Evaluation and appraisal of work	<b>6</b> = Evaluation of working methods <b>7</b> = Employee development <b>8</b> = Recruitment <b>9</b> = Discipline <b>10</b> = Co-ordination and management (the work of staff may be co-ordinated or managed through others' direct supervision)	
Location Codes:	S = Same workplace as self Number = number of other workplaces e.g. 1 = 1x other, 10 = 10x others.		
Employees supervised etc., No's, Job Groups	Type of work	Type of Responsibility Code	Location Code
E.g. 4 Finance Assistants 1 Secretary/Clerical	Order processing Typing and WP operating	1,2,3,4,5,6,8,9 2,5	S S
<b>Cleaners Site colleagues and grounds team</b>	<b>All duties</b>	<b>1 – 10 inclusive (8 &amp; 9 involve support from specialist colleagues)</b>	<b>S</b>
<b>3.</b> Do you have other responsibilities not listed above, which impact on staff even though there is no direct managerial or supervisory relationship?			

Responsibility	Nature of Impact	Employees affected – give numbers and job group where relevant
E.g. Giving legal advice on employee discipline and employment tribunal cases	Effects individual managers and overall management	Staff and managers throughout Trust
<b>Provides advice and guidance to staff on risk assessments and policies</b>	<b>Ensuring other service areas are safely managed.</b>	<b>Staff and students</b>

## Responsibility for Financial Resources

This factor measures the DIRECT (hands on) responsibility of the jobholder for financial resources, including budgets, accounting for expenditure or the administration of invoices etc.

<b>1.</b> Are you directly responsible for financial resources?			
No <input type="checkbox"/>	Go to the next question		Yes <input checked="" type="checkbox"/> Complete the table below:
Financial responsibility	Value	Nature of impact	How often
Handling cash	<b>£15</b>	<b>Petty cash expenditure</b>	<b>1 per term</b>
Security of cash and other financial resource			
Handling of cheques, invoices, other financial transaction documents			
Accounting for receipts or expenditures	<b>Variable, up to £150k for secondary</b>	<b>Confirming work completed to satisfactory standard</b>	<b>weekly</b>
Authorising expenditures	<b>As per scheme of delegation</b>	<b>Escalates for final approval (to Principal, CBM, FD, CEO)</b>	<b>Daily</b>
Budget setting	<b>c£250k annual allocation for secondary</b>	<b>Efficient use of allocated budget maximises VFM</b>	Annually
Budget monitoring	<b>Annual allocation (c£250k)</b>	<b>Ensures school remains within budget</b>	<b>Monthly</b>
Long term financial planning			
Income collection or generation			
Other, please specify			
<b>2.</b> Do you have any other responsibilities that focus on the organisation'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 organisation's financial policies or wellbeing)			
No <input checked="" type="checkbox"/>	Go to the next section – Responsibility for Physical Resources		Yes <input type="checkbox"/> Please specify below:
Responsibility	Nature of Impact		

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## Responsibility for Physical and Information Resources

This factor measures the DIRECT (hands on) responsibility of the jobholder for physical resources, including information systems, equipment or tools, buildings, supplies or stocks, and personal possessions of others.

<b>1.</b>	Are you responsible for any manual or computer information?	
No	<input type="checkbox"/>	Go to the next question
Yes	<input checked="" type="checkbox"/>	Complete the table below
Information for which responsible	Nature of responsibility	How often
E.g. Computerised personnel (50 fields) and sickness absence records for 1000 employees	Input accurately data on computer, undertake pre-set analyses, maintain confidentiality and security	Daily
<b>Stocks / supplies</b>	<b>Ensuring school does not run out</b>	<b>Weekly</b>
<b>Safety checks /compliance data</b>	<b>Compliance with H&amp;S regulations</b>	<b>Weekly</b>
<b>Contracts</b>	<b>Monitoring performance, VFM and expiration</b>	<b>Monthly</b>
<b>2.</b>	Do you adapt, design or develop any information systems?	
No	<input checked="" type="checkbox"/>	Go to the next question
Yes	<input type="checkbox"/>	Complete the table below:
Information system (type & size)	How adapt/design	How often
E.g. Departmental accounts system with 500 cost centres and 100 cost codes	Draw up specification for information to be held and analysis requirements for programmer to execute	Once a year
<b>3.</b>	Do you use any office or other equipment, tools or instruments, or vehicles, plant and machinery?	
No	<input type="checkbox"/>	Go to the next question
Yes	<input checked="" type="checkbox"/>	Complete the table below:
Equipment etc. used	Nature of use and responsibility	How often
E.g. Mower, rotovator and hedgecutter (£1500) Garden tools and wheelbarrow (£500)	Use and general cleaning and greasing as necessary Use and general cleaning	Daily
<b>Heavy duty cleaning equipment, Access equipment</b>	<b>As intended, safe operation, maintenance and storage</b>	<b>Weekly</b>
<b>Mowers, tractors</b>	<b>" "</b>	<b>Weekly</b>
<b>Hand power tools</b>	<b>" "</b>	<b>Daily</b>
<b>4.</b>	Are you responsible for the cleaning, maintenance or repair of buildings, external creations or equivalent?	

No <input type="checkbox"/>	Go to the next question	Yes <input checked="" type="checkbox"/>	Complete the table below:
Building / Location	Nature of responsibility		How often
E.g. School site	Inspection of cleaning		Daily
School PPE School Grounds	<b>Overall responsibility for remaining open, safe and compliant including all repairs, cleaning, access to sit and legal compliance</b>		<b>Daily</b>
5.	Are you responsible for the adaptation, development or design of land, buildings, other construction works or equivalent?		
No <input type="checkbox"/>	Go to the next question	Yes <input checked="" type="checkbox"/>	Complete the table below:
Land / Building etc.	Nature of responsibility		How often
E.g. Gardens – 1 acre	Landscaping of borders		Twice per year
<b>Adaptation of internal or external spaces</b>	<b>Coordination of projects as requested / responding to evolving school needs</b>		<b>2 x year</b>
6.	Are you responsible for the security of any buildings, external locations or equivalent?		
No <input type="checkbox"/>	Go to the next question	Yes <input checked="" type="checkbox"/>	Complete the table below:
Building / External Location	Nature of responsibility		How often
E.g. 15 multipurpose inside and outside sports centres (£15m)	Draw up, and ensure compliance with security policy for the centres, their contents and users		Daily on an ongoing basis
<b>Building and site</b>	<b>Implementing policies for security / maintaining CCTV</b>  <b>Key holder responsibility</b>  <b>Overseeing lock up of property</b>		<b>daily</b>
7.	Do you order or control the stock of any equipment or supplied?		
No <input type="checkbox"/>	Go to the next question	Yes <input checked="" type="checkbox"/>	Complete the table below:
Equipment/supplies ordered or controlled	Value	How often	
E.g. Ordering and stock control or departmental stationery from central supplies	£15000 pa	Monthly order	
<b>Cleaning materials</b>	<b>15 – 20 k per annum</b>	<b>Monthly orders</b>	
<b>Miscellaneous stock items</b>	<b>10k per annum</b>	<b>Monthly orders</b>	
<b>Spare parts and maintenance consumables</b>	<b>Value £10k + per year</b>	<b>As required</b>	
8.	Are you responsible for any personal possessions of others?		

No <input checked="" type="checkbox"/>	Go to the next question	Yes <input type="checkbox"/>	Complete the table below:
Personal possessions	Nature of responsibility		How often
<b>9.</b>	Are you responsible for the planning of purchasing and the development of physical resources?		
No <input type="checkbox"/>	Go to the next question	Yes <input checked="" type="checkbox"/>	Complete the table below:
Physical resources	Planning responsibility		How often
E.g. Food for schools	Securing most economical purchase of food to appropriate quality standards in accordance with procurement procedures		Continuously
<b>Loose furniture, fixtures and equipment</b>	<b>Securing best value and compliance with procurement policy</b>		<b>1 x month</b>
<b>10.</b>	Do you have any 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?		
No <input checked="" type="checkbox"/>	Go to the next section – Working Conditions	Yes <input type="checkbox"/>	Complete the table below:
What	Nature of responsibility		How often

Working Conditions			
This factor measures any exposure to unpleasant working conditions, for example dirt, dust, heat and cold.			
1.	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.		
Places of work			% of Time
<b>Internal school buildings</b>			<b>75%</b>
<b>External site</b>			<b>5%</b>
<b>Roof</b>			<b>10%</b>
<b>Plant rooms</b>			<b>10%</b>
2.	If you work outside, are you required to do so in all weather conditions?		
Yes	<input checked="" type="checkbox"/>	Go to the next question	
No	<input type="checkbox"/>	When are you not required to work outdoors?	
3.	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)?		
No	<input type="checkbox"/>	Go to the next question	Yes <input checked="" type="checkbox"/> Complete the table below:
Environmental working condition		Nature	How long at any one time
E.g. Noise		Children shouting in a playground	½ hour
<b>Smell</b>		<b>Drains/sewers</b>	<b>1 hour</b>
<b>Cold</b>		Working externally	<b>2 hours</b>
			<b>Ad hoc</b> 3 x week (seasonal)
4.	Do you experience any verbal abuse, aggression or other anti-social behaviour from people (other than your immediate work colleagues)?		
No	<input type="checkbox"/>	Go to the next question	Yes <input checked="" type="checkbox"/> Complete the table below:
Nature and source of abuse/aggression		How long at any one time	How often - % working time
E.g. Swearing from angry parents or members of the public			5 per day – less than 5%
<b>Swearing from students, parents</b>		<b>1 min</b>	<b>1 x month</b>
5.	Do you encounter any hazards in your job?		
No	<input type="checkbox"/>	Go to the next question	Yes <input checked="" type="checkbox"/> Complete the table below:
Hazard		How long at any one time	How often - % working time
E.g. Being cut when cleaning lawn mower blades		10 minutes	Once a day – 1-2%

<b>Electric shocks, burns, bumps, bruises, cuts (During performance of repairs and maintenance of PPE)</b>		<b>variable</b>	<b>15%</b>
<b>6. Do you encounter any other disagreeable or unpleasant working conditions in your job?</b>			
No <input type="checkbox"/>	Go to the next question		Yes <input checked="" type="checkbox"/>
What and Nature		How long at any one time	How often - % working time
<b>Cleaning sick excrement</b>		<b>10 minutes</b>	<b>1 x month</b>
<b>7. Do you wear any form of protective clothing to carry out your job?</b>			
No <input type="checkbox"/>	Questionnaire Complete		Yes <input checked="" type="checkbox"/>
What		Why	How long at any one time
<b>Safety boots high visibility gloves Face mask (all general PPE)</b>		<b>Identified as required protection via risk assessments for role</b>	<b>All the time 30 min 30 min 30 min</b>
			<b>100% 5% 5% 2%</b>

<b>Authorisation</b>			
I consider that this questionnaire is a fair and accurate statement of the requirements of the job.			
<b>Employee Sign* &amp; Print Name</b>		<b>Date*</b>	
<b>Line Manager Sign* &amp; Print Name</b>		<b>Date*</b>	