

# Brooke Weston Trust – Job Families

## Job Evaluation Questionnaire

### Job title

Personal Assistant (with H&S responsibility)

### General Questions

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

To provide high quality administrative support to the Principal and staff of the school and to all external stakeholders. To support the Principal in promoting a culture of H&S awareness within the school, with oversight of the H&S audit action plan.

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

As below.

**% of time**

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

	Main tasks/duties/responsibilities	% of time
1	School to home communications (letters/weekly newsletters/phone calls)	20% 15%
2	Managing all group mailboxes into the school	20% 15%
3	Whole school /senior leadership administrative support – HR, staff absences, MIS (staff)	15% 10%
4	Daily student and staff enquiries	20% 15%
5	Diary and events management (senior colleagues/whole school)	15% 10%
6	Co-ordinating meetings, including arranging room bookings/refreshments	10% 5%
7	Ownership of H&S action plan, ensuring follow-up actions are carried through	10%
8	Responding to H&S queries and providing support on established procedures	10%
9	H&S walks with Principal around the school	10%

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	New intake/mid-year admissions	1 per year (takes several months) and ad hoc
2	In year admissions and removal of students	Around 8 times per year

	3	Clerk to governors – administration and attendance at meetings	3 times per year plus strategy days and year round correspondence	
	4	Preparation for annual H&S audit – ensure documentation is in place	Once annually	
	5	Review and development of internal H&S procedures (i.e. invacuation and evacuation)	Once every half term	

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	Excellent literacy skills required for written communication and numeracy skills for purchase orders and diary management. Literacy skills for reviewing and editing internal procedures, reviewing H&S reports.	Through education and experience
(2) Procedural (e.g. procedures instructions for carrying out tasks)	Good range of procedural knowledge required, based on previous experience. Understanding of H&S procedures to ensure compliance with required standards. Making amendments to procedures to ensure they are fit for purpose.	Previous experience, on the job training, self-directed learning
(3) Equipment (e.g. machines, tools, instruments)	Desktop PC, photocopier, fire extinguisher	Onsite training where required
(4) Administrative systems	Knowledge of CMIS management information system required to process data, knowledge of Microsoft Office (Excel, PowerPoint, Word and Outlook). Knowledge of systems for trips and visits	Previous experience
(5) Organisational (e.g. own and other sections/departments), including arrangements and policies	Knowledge of educational environment, BWT policies and school procedures, understanding of BWT H&S policy and its application within school.	Previous knowledge and experience. On the job training, experience gained through staff training
(6) Specialist (e.g. finance, IT, social work), including practical, theoretical and conceptual knowledge	Data protection – handling sensitive data Child Protection – handling sensitive data, dealing with students BWT Admissions policy H&S knowledge – what needs to be in place to ensure the school is compliant.	Previous experience plus in house training and acquiring knowledge as part of the role Basic H&S IOSH 1 day training.

(7)	Other languages and cultures	Awareness of other cultures	Experience
(8)	Other, please specify		

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.			
<b>1.</b>	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			
Admissions – Advising parents on the correct steps in order to place an appeal Recording, monitoring and reviewing staff absence records to ascertain if escalation through the staff absence policy is required. Analyse absences, including reasons, and make recommendations to Principal about appropriate course of action.			
Example 2			
Diary management – Organising an appropriate time for meetings between the Exec. Principal, Principal or Vice Principals to meet with the party in question. Allocation of rooms to the meetings and ensuring refreshments are organised. This may require changes at short notice and is time critical. Postholder reports on accidents within school, assesses the incident/situation and identifies how this could be avoided in the future. Postholder makes recommendations to relevant members of staff to action and records this information for the Principal.			
<b>2.</b>	In the box below, give an example of the most difficult or important decisions or recommendations you make or problems you solve.		
Calming parents who are either on the phone or at reception and helping them to speak with the appropriate member of staff Postholder may make recommendation based on H&S requirements which are unpopular or make things inconvenient for members of staff i.e. do not store paper on top of a radiator, this should be stored elsewhere. This is then followed up by the next management walk with the Principal.			
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	<b>day month</b>	
<b>3.</b>	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	<input type="checkbox"/>	Go to the next question	Yes <input checked="" type="checkbox"/>
		Give an example in the box below:	
Example of decision / recommendation / problem:			
External visitors/ parents arriving on site for an appointment and the Principal they are meeting has been called into an urgent meeting Recommendation to avoid a potential H&S incident, based on an incident that has occurred on site.			
Indicate nature and complexity of information / situation:			
Causes problems for the Principal's diary for the rest of the day and is frustrating for the visitor Situation can be complex in determining the cause of the incident, based on accounts of others. Issue may not be obvious.			
How do you interpret or analyse the information / situation?			
Depends on the temperament on the visitor – explain the situation and seat them. Move the diary around to suit both visitor and Principal. Analysis of previous incident to determine what mitigating actions can be put in place to avoid it reoccurring. Seek advice from H&S advisors and BWT colleagues if required.			

<b>4.</b>	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		
<b>3</b>	The work requires creative skills for solving straightforward problems		
<b>1</b>	The work requires creative and developmental skills for solving varied problems		
<b>2</b>	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.		
Give an example for the option you have marked 1, as being most typical			
Problems vary greatly from designing a new form, adding things to the website and drawing up Governor policies to dealing with difficult parents and solving room clashes for meetings Ensuring that contractors have DBS checks completed in line with H&S/Safeguarding policies.			
<b>5.</b>	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)	<input checked="" type="checkbox"/>
		Medium term (months, up to a year)	<input checked="" type="checkbox"/>
		Long term (more than a year)	<input checked="" type="checkbox"/>
	Please give a typical example below:		
	Short/ Medium/ Long Term - Scheduling meetings, room bookings, refreshments, phone calls, letters, admissions procedures, appeal panels, Governors meetings and link visits – all take place from as little as hours in advance to over a year in advance, continual monitoring of internal school calendar to ensure that trips and events are entered, clashes are avoided and parents are notified in an appropriate timescale. Building works to address H&S issues are planned in advance.		
<b>6.</b>	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	
Calm		To deal with people	
Organised		To direct people	
Assertive		To direct staff and parents	
Efficient		To complete tasks accurately and quickly	
Patience		To allow people time to fully convey any difficult issues they may be trying to disclose.	
Resilience			

	<p>maintain professionalism throughout, to ensure matters are fully resolved, and to withstand any attempts (deliberate or otherwise) by colleagues to influence actions/decisions.</p>
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## 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 checked="" type="checkbox"/>	Students and concerned parents
Training skills	<input checked="" type="checkbox"/>	Help to train new admin staff, maintains H&S training records for staff
Team working skills	<input checked="" type="checkbox"/>	Working with the admin team and SLT
Motivational/team leading skills – includes own staff	<input checked="" type="checkbox"/>	Peer support, promotes H&S awareness with colleagues
Advising, guiding skills	<input checked="" type="checkbox"/>	Advising parents <b>and staff on various Academy policies and procedures</b> , <u>provision of H&amp;S support to colleagues based on these procedures</u>
Persuading, influencing skills	<input checked="" type="checkbox"/>	With colleagues to ensure H&S best practice is adopted when it may seem 'inconvenient'
Counselling skills	<input type="checkbox"/>	
Conciliating skills	<input type="checkbox"/>	
Advocacy skills	<input checked="" type="checkbox"/>	Advocate of H&S on behalf of the Principal
Negotiating skills	<input type="checkbox"/>	
Oral (spoken) communication skills	<input checked="" type="checkbox"/>	Internal and external communications
Written communication skills	<input checked="" type="checkbox"/>	Letters, newsletters, emails, writing internal procedures
Oral presentation skills	<input checked="" type="checkbox"/>	When hosting and touring visitors round the Academy
Other interpersonal or communication skills	<input type="checkbox"/>	Flexibility – accommodate changing requests
<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 type="checkbox"/>	Keyboard used for some aspects of work (writing procedures, responding to emails)	
Precision and speed, keyboard skills integral to main duties	<input type="checkbox"/>		
Considerable precision and speed, keyboard skills e.g. for data input	<input checked="" type="checkbox"/>	Processing staff/student information/ writing correspondence/ minutes – high level of accuracy required	
<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"/>	Personal car	Occasional visits to the other academies, for admissions/Governors
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 checked="" type="checkbox"/>	Go to the next section – Initiative and Independence	
Yes	<input type="checkbox"/>	Complete the table below	
Skill	Used for		Precision / Speed
E.g. Dexterity	Peeling, chopping vegetables		Economical use, portion control, restricted time

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**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.

**1.** How do you know what you should be doing each day?  
 Explain briefly below:

Plan ahead. Responding to/implementing projects/work as set by Principal, respond to set tasks to carry out each day – emails, letters, diary management. Tasks generated as a result of email communications. Prioritise tasks for the day based on urgency and fit in other jobs. Follow year planner/internal calendar to ensure regular items take place when they should.  
 On behalf of the Principal, postholder is responsible for ensuring actions arising from the H&S audit action plan are followed through. Postholder provides support on H&S issues when they arise.

**2.** What instructions, procedures, policies, legislation, govern your work?  
 Explain briefly below:

- Instruction from SLT
- BWT policies and procedures
- Postholder seeks advice from H&S Executive when required.

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

Example 1

Postholder deals with calls/matters arising without referring everything to SLT – but they are always made aware of matters/actions taken as appropriate. E.g. – not refer general questions about Admission Appeals process; scheduling appointments (although information is passed on prior to meetings)  
 Ensuring procedures for responding to critical incidents (i.e. flood) are followed and reported.

Example 2

Moving room bookings to accommodate short notice/urgent requests.  
 Ensure procedures for ensuring safeguarding checks on visitors/contractors are understood and followed through.

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

Example 1

**Any complaints would be referred to a member of SLT to handle.**  
 If a serious risk or threat is posed to the school – i.e. terrorist threat – this would be reported directly to the Principal who would enter into crisis management procedures. Postholder would be responsible for supporting the Principal in this instance (making phone calls, notifying relevant persons)

Example 2

Any safeguarding concerns would be referred to a member of SLT to handle.  
 Decision to close the school site based on issues with infrastructure would be referred to the Principal.

**5.** 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)
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E.g. Regular team meetings	Supervisor – Senior Social Worker	Every 2 weeks
Performance Management	Principal	Annually
Staff training	Child protection, safeguarding team	Annually
One-to-one meeting (discussion/planning updating and making recommendations)	Line Manager (Principal)	Weekly
Informal catch ups	Principal	Daily

## 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>Sitting at a Keyboard</b>	
		How long do you have to maintain this position at any one time?	<b>75% of the day</b>	
		And how often?		times per
<b>2.</b>	Does your job involve any other physical demands?			
No	<input checked="" type="checkbox"/>	Go to the next section – Mental Demands		
Yes	<input 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 checked="" type="checkbox"/>	Go to the next question		
Yes	<input 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%
<b>5.</b>	Does your job require pushing and/or pulling of items or equipment?			

No	<input checked="" type="checkbox"/>	Go to the next question			
Yes	<input type="checkbox"/>	Complete the table below:			
What and why		How heavy	How far	For how long	How often % working time
<b>6.</b>	Does your job require rubbing, scrubbing, digging or similar form of physical effort?				
No	<input checked="" type="checkbox"/>	Go to the next question			
Yes	<input type="checkbox"/>	Which of these, and for what purposes?			
		How long at any one time do you rub and/or scrub, dig or similar?			
		And how often?			
<b>7.</b>	Does your job require working in an awkward position (e.g. crouching, kneeling)?				
No	<input checked="" type="checkbox"/>	Go to the next question			
Yes	<input 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%	
<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 checked="" type="checkbox"/>	Go to the next question	
Yes	<input 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%
<b>Visual and listening attention</b>	Minuting meetings	Up to 2 hours	Weekly
<b>Visual and listening attention</b>	Monitoring student behaviour around the school	Up to 1 hour	Daily
<b>Visual and listening attention</b>	Observing if there are any H&S concerns following an incident (accident analysis)	Up to 30 mins	Weekly
<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%
Concentrating on multiple tasks at one	Proof Reading – e.g. documents to be uploaded on to the website (adverts/job descriptions etc.)	up to 2 hours	daily
Concentration skills	Coordinating Appeals paperwork	In year – 8 times a year / New intake – once a year across 2 months	
Attention to detail	Taking minutes and producing these for complex and important meetings. Drafting correspondence for the	2 hours	Every few months

	principal. Recording and analysing staff absence.		
Enhanced mental attention	Reviewing risk assessments to ensure these are suitable and compliant. Proof-reading procedures	1-2 hours 1-2 hours	3-4 per term Termly
Concentrated mental attention	Development of in-house procedures	2-3 hours	Annual review with follow-up amendments

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

No  Go to the next question

Yes  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
Telephone interruptions	Parents/ External agencies	2 – 10 minutes per call	5-10 times per day
Continuous interruptions	Students	2 – 10 minutes	8 times per day
Continuous interruptions	Staff (Various urgent and unplanned matters arising at any time) H&S support	2 – 10 minutes	5-10 times per day
Conflicting Demands	Juggling demands of multiple Principals, H&S incidents	All day	
Time Pressures	Strict Appeal Deadlines	8-10 times a year (In Year and New Intake)	Occupy 70% of time when New Intake Appeals are underway

**4.** Does your job involve any other form of mental demand?

No  Go to the next section – Emotional Demands

Yes  Complete the table below:

Mental Demand	Source	For how long	How often % working time
<b>Stress</b>	Parents	Up to 10 minutes	Ad hoc




## 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.)

<b>3.</b>	Does your job involve any other form of emotional demand?		
No	<input checked="" type="checkbox"/>	Go to the next section – Responsibility for People	
Yes	<input type="checkbox"/>	Compete 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	
Diary Management	Principals/Pupils/staff/parents	They get the appointment they need at a suitable time	
Document preparation and minute taking	Principals/Governors	Meetings are organised efficiently, with correct documents and minutes are recorded accurately so that matters can be actioned	
Provision of H&S support to staff based on best practice. On behalf of the Principal, ensuring actions from H&S audit are carried out.	Staff, students, parents	Safe working and learning environment.	
<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 checked="" type="checkbox"/>	Go to the next question	Yes <input 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) Enforce	Who direct impact on	Nature of impact	
<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	
Staff wellbeing – postholder would signpost colleagues to support systems/programmes that are in place	Access to wellbeing support, H&S for staff	Staff	
	Do you have any other responsibilities for people, including health and safety?		
Other responsibilities	Who benefits	How benefit	

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### Responsibility for Supervision/Direction/Coordination of Employees

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
New admin staff	Help with their training - guiding on school procedures, how to use office equipment and CMIS	2-3 times a year (as a when required)
Site team, admin team	Support and guidance relating to H&S expectations	As and when required
<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:	<b>S</b> = Same workplace as self <b>Number</b> = number of other workplaces e.g. <b>1</b> = 1x other, <b>10</b> = 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
Site team, admin team	On behalf of the Principal, ensuring duties are carried out in a way that is compliant with H&S regulations	1,2,3,6	<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	
Postholder is responsible for ensuring staff are aware of H&S related procedures and policies. Promotion of H&S awareness amongst colleagues.	On behalf of the Principal, promotion of H&S culture within school, ensuring a safe working and learning environment is maintained.	All school employees	

## 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 checked="" type="checkbox"/>	Go to the next question	Yes <input type="checkbox"/>	Complete the table below:
Financial responsibility	Value	Nature of impact	How often
Handling cash			
Security of cash and other financial resource			
Handling of cheques, invoices, other financial transaction documents			
Accounting for receipts or expenditures			
Authorising expenditures			
Budget setting			
Budget monitoring			
Long term financial planning			
Income collection or generation			
Other, please specify			
<b>2.</b> 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 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		

### 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
<ul style="list-style-type: none"> <li>• Pupil and staff information</li> <li>• Ad Hoc HR when needed</li> <li>• Admissions information</li> <li>• Pupil Exclusion data</li> <li>• Room booking system</li> <li>• Staff H&amp;S training records</li> <li>• Internal procedures and guidance notes</li> <li>• Risk assessments</li> <li>• Accident log</li> </ul>	Input accurately data on computer, undertake pre-set analyses, and maintain confidentiality and security. School and EPM system. Run reports, inputting data and changing attendance records  Maintain, update and store securely	Daily Monthly Weekly Weekly  As and when required
<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"/>	Compete 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"/>	Compete 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



Desktop PC and Laptop Interactive White boards/Projector Photocopier/ Scanner Shredder Laminator Binder		General use		Daily
<b>4.</b>	Are you responsible for the cleaning, maintenance or repair of buildings, external creations or equivalent?			
No	<input checked="" type="checkbox"/>	Go to the next question		Yes <input type="checkbox"/>
				Complete the table below:
Building / Location		Nature of responsibility		How often
E.g. School site		Inspection of cleaning		Daily
<b>5.</b>	Are you responsible for the adaptation, development or design of land, buildings, other construction works or equivalent?			
No	<input checked="" type="checkbox"/>	Go to the next question		Yes <input 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>6.</b>	Are you responsible for the security of any buildings, external locations or equivalent?			
No	<input checked="" type="checkbox"/>	Go to the next question		Yes <input 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>7.</b>	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
Stationery on behalf of the Principal's			As and when required
<b>8.</b> Are you responsible for any personal possessions of others?			
No	<input checked="" type="checkbox"/>	Go to the next question	Yes <input type="checkbox"/>
Personal possessions		Nature of responsibility	How often
Students' possessions		When confiscated	Ad hoc
<b>9.</b> Are you responsible for the planning of purchasing and the development of physical resources?			
No	<input checked="" type="checkbox"/>	Go to the next question	Yes <input type="checkbox"/>
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>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"/>
What		Nature of responsibility	How often
Development of internal procedures relating to H&S. Support to staff based on BWT H&S policy.		Provision of support and guidance based on established procedures.	As and when required

## 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
Office	100%

**2.** If you work outside, are you required to do so in all weather conditions?

Yes <input type="checkbox"/>	Go to the next question		
No <input checked="" 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"/>	Compete the table below:
Environmental working condition	Nature	How long at any one time	How often - % working time	
E.g. Noise	Children shouting in a playground	½ hour	Approx 15%	
<b>Noise</b>	Students moving through the office	10 mins at any one time	Daily	

**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"/>	Compete 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%		
Angry and upset parents	2-5 minutes	2-3 per month		

**5.** Do you encounter any hazards in your job?

No <input checked="" type="checkbox"/>	Go to the next question		Yes <input type="checkbox"/>	Compete 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>6.</b> Do you encounter any other disagreeable or unpleasant working conditions in your job?					
No <input checked="" type="checkbox"/>		Go to the next question		Yes <input type="checkbox"/>	
What and Nature			How long at any one time		How often - % working time
<b>7.</b> Do you wear any form of protective clothing to carry out your job?					
No <input checked="" type="checkbox"/>		Questionnaire Complete		Yes <input type="checkbox"/>	
What		Why		How long at any one time	

Authorisation			
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>