

Brooke Weston Trust – Job Families

Job Evaluation Questionnaire

Job title

Personal Assistant (to Principal and Executive Principal)

General Questions

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

To provide high quality administrative and project management support to the Associate Principal and Executive Principal of the school.

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)	5%
2	Managing all group mailboxes into the school	5%
3	Provision of admin services to senior leadership (to include HR admin, data admin)	20%
4	Dealing with student and staff enquiries on behalf of the Principal/Executive Principal	20%
5	Diary and events management, co-ordinating meetings for Principal and Executive Principal.	20%
7	Minute-taking/clerking on behalf of the Principal, Executive Principal and governing body (and others where required)	10%
8	Project support as delegated by Principal/Executive Principal	20%

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	Clerk to Governors – Administration, attendance and minute taking at LGB Meetings, LGB Subcommittee meetings and POAP meetings	6 to 8 times per year

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	Through education and experience
(2) Procedural (e.g. procedures instructions for carrying out tasks)	Good range of procedural knowledge required, based on previous experience	Previous experience, on the job training, self-directed learning
(3) Equipment (e.g. machines, tools, instruments)	Desktop PC, photocopier	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)	Previous experience
(5) Organisational (e.g. own and other sections/departments), including arrangements and policies	Knowledge of educational environment, BWT policies and school procedures	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	Previous experience plus in house training and acquiring knowledge as part of the role
(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.

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

If a member of staff approaches postholder requesting to meet with the Principal or Executive Principal, postholder uses judgement skills to determine if they can resolve the problem without needing to escalate to a senior leader. This may include advising them on a particular policy that needs to be followed or communicating/relaying the views of the Principal or Executive Principal based on their prior knowledge (provided this is not confidential and is publicly known). If a meeting is required, postholder uses judgement skills to determine the urgency of the meeting.

Example 2

Principal and Executive Principal delegates specific actions to the postholder to undertake on their behalf – i.e. there is a concern about the wellbeing of a member of staff. Postholder will seek to understand the cause of the concerns and identify actions to mitigate these, using judgement to recommend best course of action.

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

When a disgruntled member of staff approaches the postholder demanding to speak with the Principal or Executive Principal, the postholder will take action to calm down the member of staff and seek to resolve the issue before it is escalated. These actions may be taken on by the postholder themselves. This may involve dissuading from submitting a grievance/complaint and another course of action may be recommended to solve the issue.

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 week

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:

The Principal/Executive Principal are planning to announce a management decision which will be unpopular amongst members of staff i.e. relating to budget cuts, restructures or redundancies. Postholder will make recommendations as to the best method and timing for communicating this message based on knowledge of general school culture and other staffing dynamics.

Indicate nature and complexity of information / situation:

Nature extremely confidential and situation would need to be handled sensitively. Postholder is responsible for assisting in mitigating the reputational risk to the school by recommending best course of action.

How do you interpret or analyse the information / situation?

Postholder will determine the general mood of staff, acting as the main contact for the Principal/Executive Principal, liaising with line managers and Heads of Department in a discrete and confidential manner to seek advice or information which may be useful to share with the Principal/Executive Principal prior to announcing the decision. Postholder will identify possible pitfalls with communication of the message and flag to Principal/Executive Principal.

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		
3	The work requires creative skills for solving straightforward problems		
1	The work requires creative and developmental skills for solving varied problems		
2	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			
Use of creative skills for dealing with an issue raised by a member of staff, identifying a range of approaches which could be taken to avoid the issue being escalated unnecessarily to the Principal/Executive Principal. This may require a hands-on approach by the postholder to take action to resolve. Refer to Principal/Executive Principal if needed.			
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) <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.		
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	
Calm Organised Assertive Efficient Patience		To deal with people To direct people To direct staff and parents To complete tasks accurately and quickly To allow people time to fully convey any difficult issues they may be trying to disclose.	

<p>Resilience Problem-solving skills</p>	<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).

1.	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"/>	Required for students and staff
Training skills	<input checked="" type="checkbox"/>	Help to train new admin staff
Team working skills	<input checked="" type="checkbox"/>	Working with senior leaders, HOD and other colleagues
Motivational/team leading skills – includes own staff	<input checked="" type="checkbox"/>	Peer support with fellow colleagues
Advising, guiding skills	<input checked="" type="checkbox"/>	Advice and guidance skills to staff based on knowledge of policies/procedures and interests of the Principal/Executive Principal. Advice to Principal/Executive Principal based on knowledge of school/staff dynamics.
Persuading, influencing skills	<input checked="" type="checkbox"/>	Persuading and influencing skills to Principal/Executive Principal based on knowledge of school/staff dynamics. SLT and HODs to follow the correct course of action to avoid disputes/claims.
Counselling skills	<input type="checkbox"/>	
Conciliating skills	<input checked="" type="checkbox"/>	Resolving informal disputes between staff, based on established policy and procedure. Attempt to de-escalate situations by co-ordinating the right people to get involved.
Advocacy skills	<input checked="" type="checkbox"/>	Advocate on behalf of Principal, Executive Principal and BWT – actions to maintain and uphold reputation of Academy and Trust.
Negotiating skills	<input checked="" type="checkbox"/>	Used to diffuse staff issues and suggest an alternative course of action.
Oral (spoken) communication skills	<input checked="" type="checkbox"/>	Internal and external communications
Written communication skills	<input checked="" type="checkbox"/>	Letters, newsletters, emails
Oral presentation skills	<input checked="" type="checkbox"/>	When hosting and touring visitors round the Academy
Other interpersonal or communication skills	<input checked="" type="checkbox"/>	Flexibility – accommodate changing requests
2.	Are you required to use a language (oral or written) other than English?	

No Go to the next question

Yes Complete the table below

Language	Used to communicate with.	Used for.

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.

1.	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"/>		
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	
2.	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"/>		
3.	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:

Postholder works in line with general job description and priorities own workload accordingly. Postholder acts as delegate for the Principal and Executive Principal for ongoing project support and works on own initiative to ensure all actions are carried out. Postholder responds to unexpected issues which occur throughout the day and responds to these independently.

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

- Instruction from SLT
- Annual calendar for the school
- BWT policies and procedures – provides advice to others based on these policies.

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

Example 1

If a member of staff or contractor is requesting particular personnel information in order to avoid school resources being deleted when members of staff are leaving, postholder would discuss with staff member/contractor on how to develop a system to achieve the objective without sharing personnel information of staff.

Example 2

Postholder would make a decision as to whether a diary commitment needs to be re-arranged or when the Principal/Executive Principal would need to be interrupted based on the seriousness of the issue. Postholder will attempt to mitigate the issue as far as is possible in the meantime.

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

Example 1

Postholder would refer problem or decision to Principal/Executive Principal where there was a significant reputational risk to the Academy – i.e. student behaviour issue or staff conduct issue.

Example 2

Any safeguarding disclosures would be referred to the Designated Lead or Designated Manager.

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)
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) & Executive Principal	Weekly
Informal catch ups	Principal & Executive Principal	Regularly

Physical Demands

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

1.	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?	Sitting at a Keyboard	
		How long do you have to maintain this position at any one time?	75% of the day	
		And how often?		times per
2.	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		
3.	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
4.	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%
5.	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
6.	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?			
7.	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%	
8.	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.

1.	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 and listening attention	Minuting meetings	Up to 2 hours	Weekly
Visual and listening attention	Monitoring student behaviour around the school	Up to 1 hour	Daily
2.	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 once	Proof Reading – e.g. documents to be uploaded on to the website (adverts/job descriptions etc.)	up to 2 hours	daily
Attention to detail	Taking minutes and producing these for complex and important meetings. Drafting correspondence for the principal. Recording and analysing staff absence.	2 hours	Daily

Enhanced mental attention	Typing up minutes from HR investigation or governing body meeting	Full day	Monthly
Concentrated mental attention	Preparing reports/briefings on behalf of the Principal and Executive Principal	2-3 hours	Monthly
3.	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
Telephone interruptions	Parents/ External agencies/Colleagues	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)	2 – 10 minutes	5-10 times per day
Conflicting Demands	Juggling demands of multiple Principals	All day	Ongoing
Conflicting demands	Principal and Executive Principal demands, alongside those of staff and provision of support for multiple projects	Daily	Daily
Changing deadlines	Role is reactive depending on needs of Principal /Executive Principal and any other issues that arise throughout the day that require immediate attention	Daily	Up to 10 times per day
4.	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

Stress	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.

<p>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.</p>		
<input checked="" type="checkbox"/> Yes Please give examples.	<input type="checkbox"/> No	
2. These people – who are they?	Cause of emotional stress or upset	Frequency of stress (daily/monthly/etc.)
Staff	Impact of decisions made by Principal and Executive Principal may cause staff upset which is directed at postholder as main point of contact for senior leaders. This may cause emotional stress to the jobholder. Exposure to sensitive matters by nature of minuting confidential meetings.	Monthly

3.	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
Dealing with colleagues who are facing serious disciplinary matters or redundancy by nature of role in minuting/organising proceedings.	Aware of long term personal impact and distress	2 hours	Twice a year

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.

1.	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	
Managing recording and risk assessing staff absence and arranging absence interviews	Principal, staff and pupils	Absence is managed effectively and concerns are dealt with efficiently resulting in less staff absence and less cover required.	
2.	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.	
3.	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"/>	Compete 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	
4.	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	
Interpretation of policies (HR, wellbeing)	Advice provided to members of staff enabling access to additional counselling support.	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.

1.	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)
2.	Does your job directly involve the supervision, co-ordination or management of employees or others in an equivalent position?		
No <input checked="" type="checkbox"/>	Go to the next section – Responsibility for Financial Resources		
Yes <input 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:	1 = Regular instructions 2 = Regular checking work 3 = Regular allocation of work 4 = Organisation of work 5 = Evaluation and appraisal of work	6 = Evaluation of working methods 7 = Employee development 8 = Recruitment 9 = Discipline 10 = 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
3.	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	
Provision of advice to senior leaders, HODs based on knowledge of established policies and procedures. Advice and recommendations to Principal and Executive Principal about a decision that will impact on staff.	Staff are well-informed of how to address a concern. Principal and Executive Principal are well informed about dynamics within the school.	Staff and managers Staff and managers	

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.

1. 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			
2. 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.

1. 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"> • Pupil and staff information • Ad Hoc HR when needed • Admissions information • Pupil Exclusion data • Room booking system • Sickness absence records 	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	Daily Monthly Weekly Weekly Daily Daily
2. 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
3. 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
Desktop PC and Laptop Interactive White boards/Projector Photocopier/ Scanner Shredder Laminator Binder	General use	Daily

4.	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"/>
Building / Location			How often
E.g. School site			Daily
Nature of responsibility			
Inspection of cleaning			
5.	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"/>
Land / Building etc.			How often
E.g. Gardens – 1 acre			Twice per year
Nature of responsibility			
Landscaping of borders			
6.	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"/>
Building / External Location			How often
E.g. 15 multipurpose inside and outside sports centres (£15m)			Daily on an ongoing basis
Nature of responsibility			
Draw up, and ensure compliance with security policy for the centres, their contents and users			
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"/>
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

8.	Are you responsible for any personal possessions of others?		
No <input type="checkbox"/>	Go to the next question	Yes <input checked="" type="checkbox"/>	Complete the table below:
Personal possessions	Nature of responsibility		How often
Students' possessions	When confiscated		Ad hoc
9.	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"/>	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
10.	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 type="checkbox"/>	Go to the next section – Working Conditions	Yes <input checked="" type="checkbox"/>	Complete the table below:
What	Nature of responsibility		How often
Advice on policies	Advice and guidance provided to staff based on established policies and procedures – i.e. Freedom of Information requests, data protection.		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"/>	Complete 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%	
Noise	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"/>	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%	
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"/>	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%	

6. 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
7. 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.			
Employee Sign* & Print Name			Date*
Line Manager Sign* & Print Name			Date*