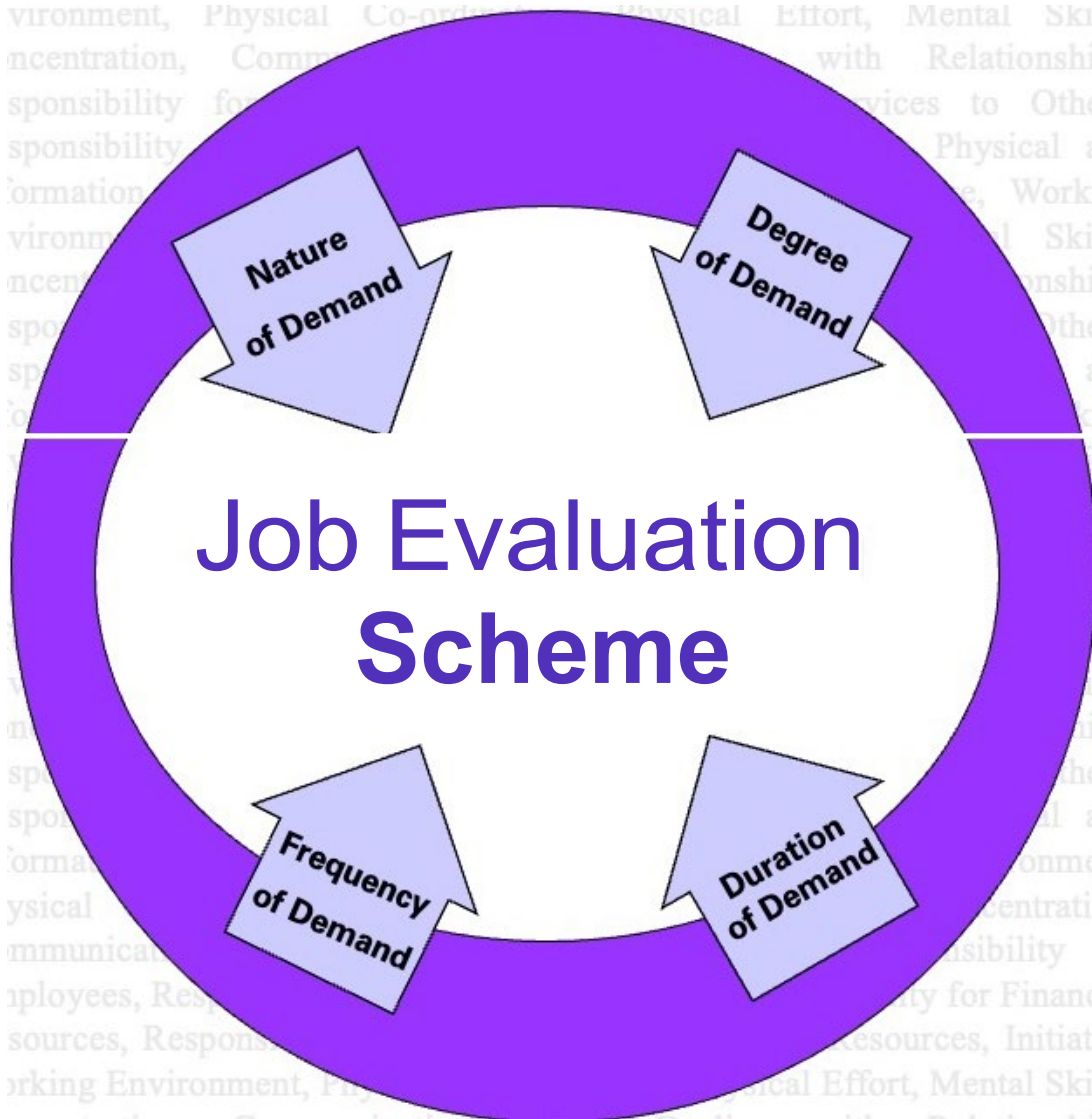


Scottish Joint Council for Local Government Employees



3rd Edition - Amended
Endorsed by the Scottish Joint Council
February 2024

Scottish Joint Council for Local Government Employees

JOB EVALUATION SCHEME 3rd Edition - Amended

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SCOTTISH JOINT COUNCIL'S JOB EVALUATION SCHEME

FOREWORD

This Job Evaluation Scheme was originally developed to reflect the range of jobs found in Scottish Unitary Authorities and support the implementation of the 1999 SJC 'Single Status' Agreement. The 1st Edition of the 'Scottish Councils' JE Scheme was based on work carried out in the National Joint Council for Local Government Services (NJC) prior to devolution. The 2nd Edition of the 'Scottish Councils' JE Scheme was endorsed by the Scottish Joint Council for Local Government Employees in October 2002; and the 3rd Edition of the 'Scottish Joint Council's' JE Scheme was endorsed by the SJC in November 2015. This 'Amended' version completes the outstanding work on the 3rd Edition; and was endorsed by the SJC in February 2024

Job evaluation continues to be the most robust method of providing a foundation for grading structures which satisfy the principle of 'equal pay for work of equal value'; and which are both fair and transparent.

This Practice Manual is designed to assist individual Scottish Unitary Councils apply, implement and maintain the use of the JE Scheme at local level. Whilst the Scheme itself will be made available to all employees to whom it is applied, this Manual is most likely to be used by those directly involved in application of the Scheme at a local level: HR staff, Trades Union representatives, line managers, and other members of staff undertaking the roles of Job Analysts, JE Appeal Panel members and/or Steering Group members.

The Practice Manual provides information on:

- the principles of job evaluation which must be maintained throughout the process to ensure the integrity of the Scheme
- the recommended process of job evaluation to be applied in Scottish Unitary Authorities,
- practical considerations relating to the application of the Scheme – initially and on an on-going basis.

The Development of the JE Scheme

In March 1999 the Scottish Councils decided to test and modify the 'Single Status' Job Evaluation Scheme developed by the National Joint Council (NJC), to ensure its suitability for implementation in Scotland, specifically:

- to accommodate the additional grades within the Scottish grading structures for APT&C Staffs and Manual Workers
- to ensure the full range of job demands likely to be found in the job population is captured by the Scheme, in particular, those jobs which are unique to Scotland

- to reflect the culture, values and ways of working adopted by the Scottish Unitary Authorities

The development of the Scottish Scheme was overseen by a Joint Steering Group involving Trades Union and Employers' representatives. Members of the Steering Group were drawn from Aberdeen City, Aberdeenshire, Angus, City of Edinburgh, East Lothian, Fife, Glasgow and South Lanarkshire Councils.

The development work was undertaken by a team of Job Analysts drawn from Aberdeen City, Aberdeenshire, Dundee City, East Ayrshire, Falkirk, Fife, South Ayrshire, West Dunbartonshire Councils and Tayside Contracts, under the guidance and supervision of Consultants whose responsibility it was to ensure that the development of the Job Evaluation Scheme:

- complied with the Equal Pay Act
- adopted the good practice guidance of the Equal Opportunities Commission and ACAS
- utilised recognised statistical techniques.

Testing the Scheme

In testing the NJC Scheme the Scottish Job Analyst Team used a representative sample of jobs, gathering information from jobholders in every Scottish Authority. Using the content of these jobs, the Team tested the suitability of the NJC Scheme in respect of:

- the structure and definitions of each of the 13 factors making up the evaluation framework - to ensure that it captures the full range of demands likely to be found in the Scottish job population, and to ensure there is no double-counting, omission or elision of demands
- the relevance of the level definitions - to ensure these reflect the nature of work as it is undertaken in the Scottish Authorities
- the step changes in demand between the levels defined under each of the 13 factor headings - to ensure that these reflect the full hierarchy of job demands
- the clarity of language of the factor and level definitions - to ensure that these reflect the culture and values of the Scottish Unitary Authorities.

Testing the Software

Having determined what modifications were required to the NJC Scheme to develop the Scottish Councils' Scheme, the Scottish Job Analyst Team then adapted and modified the computerised version of the NJC Scheme which had been developed by Pilat (UK) Limited. The Team tested the software to ensure:

- that it reflected the modifications made to develop the Scottish Councils' Scheme
- the relevance of the 'question and answer' streams
- the clarity of the language and terminology used
- that appropriate guidance is available in the help screens
- its 'user-friendliness' from the perspective of both jobholders and job evaluation practitioners.

User trials of both the final draft of the 1st Edition of the Scottish Councils' Scheme and the COSLA Gauge 'Evaluator' software were conducted by North Ayrshire Council and the Highland Council. Feedback from the jobholders and practitioners participating in these trials was used to make further amendments and refinements to the software and supporting documentation.

Fife Council assisted in revising the Gauge 'Evaluator' software to match the 3rd Edition of the Scheme; and in the introduction of the web-based version of COSLA Gauge.

Agreement

The First Edition of the JE Scheme was endorsed by both Sides of the Scottish Joint Council on 20th April 2000. A User Group was established to ensure that the Scheme and its supporting software were properly maintained and to address issues raised by User Councils. An extensive update was undertaken to improve the Scheme in the light of experience gained by Users in applying the Scheme. Changes to the supporting software were tested by the Teams at Aberdeenshire, Dumfries & Galloway, Dundee City, Highland, Scottish Borders and Orkney Islands Councils. The Second Edition of the JE Scheme was endorsed by both Sides of the Scottish Joint Council on 20th October 2002.

Review of the Scheme

In 2009 the SJC agreed to review the 2nd Edition of the JE Scheme following concerns raised by the Equalities & Human Rights Commission in their 'Valuable Assets' Report. The General Factor Guidance Notes in Section 2 were revised at that time to highlight those concerns for Job Analysts and draw attention to best practice in the assessment of the demands of caring jobs; and that revised Guidance is included in this 3rd Edition of the JE Scheme.

In order to ensure that the JE Scheme meets the requirements of the 2010 Equality Act and the Public Sector Gender Equality Duty a comprehensive was undertaken of all factor definitions, guidance, the Practice Manual and the supporting COSLA Gauge software.

Past and current members of the Joint Technical Working Group were drawn from Aberdeen City, East Lothian, Falkirk, Fife, North Lanarkshire, Renfrewshire, Stirling, West Dunbartonshire and West Lothian Councils; and from GMB, UNISON and UNITE.

They were supported by members of the SPDS Executive, an Independent Technical Adviser and an Employment Law Adviser.

The initial revisions to the factor definitions and guidance were tested by Job Analysts from Dumfries & Galloway, Falkirk, Fife, Inverclyde and Moray Councils; and all Councils were offered the opportunity to pilot the revised Scheme. The Members of the Joint Technical Working Group very much appreciate the support and assistance of all those who participated in these vital stages of the Review.

Outstanding work to complete the Review was undertaken during 2022 and 2023 by a Practitioner Sub-Group of the SJC Joint Technical Working Group drawn from Dundee, East Dunbartonshire, East Lothian, Fife, Glasgow, North Lanarkshire, Renfrewshire, West Dunbartonshire and West Lothain Councils, with the support of the Independent Technical Adviser.

We are confident that the JE Scheme remains 'fit for purpose' and that the revisions will help ensure greater consistency of application; and hope that the revised Practice Manual will help ensure local adherence to the principles and best practice approach agreed by the SJC.

**SJC Joint Technical Working Group
September 2023**

SCOTTISH JOINT COUNCIL'S JOB EVALUATION SCHEME

SECTION 3 - FACTOR FRAMEWORK

- 1 **WORKING ENVIRONMENT** - considers the predominant physical environment in which the job is normally carried out.
- 2 **PHYSICAL CO-ORDINATION** - considers the physical co-ordination predominantly required to do the job.
- 3 **PHYSICAL EFFORT** - considers the greatest and other requirements for strength and stamina required to do the job.
- 4 **MENTAL SKILLS** - considers the predominant thinking requirement of the job.
- 5 **CONCENTRATION** - considers the highest concentration typically required to do the job.
- 6 **COMMUNICATION SKILLS** - considers the most demanding spoken and written communication required in the course of normal working.
- 7 **DEALING WITH RELATIONSHIPS** - considers the predominant demands on the jobholder arising from the circumstances and/or behaviour of those he/she comes into contact with as an integral part of normal working.
- 8 **RESPONSIBILITY FOR EMPLOYEES** - considers the predominant responsibility of the jobholder for the supervision, co-ordination or management of employees or equivalent others.
- 9 **RESPONSIBILITY FOR SERVICES TO OTHERS** - considers the jobholder's predominant responsibility to others in terms of the quality and delivery of service provision.
- 10 **RESPONSIBILITY FOR FINANCIAL RESOURCES** - considers the jobholder's predominant responsibility for financial resources.
- 11 **RESPONSIBILITY FOR PHYSICAL AND INFORMATION RESOURCES** - considers the jobholder's primary and secondary responsibilities for the Council's physical and information resources.
- 12 **INITIATIVE AND INDEPENDENCE** - considers the jobholder's scope to exercise initiative and the extent to which they have the freedom to act.
- 13 **KNOWLEDGE** - considers what the jobholder needs to know to do the job.

FACTOR 1 - WORKING ENVIRONMENT

Scope of Factor

All aspects of the **physical** environmental working conditions in which the job is undertaken are considered, including dirt, smells and noise resulting from both the physical environment and contact or work with people.

Application of the Level Definitions

When assessing a job using the paper based Scheme consideration should be given:

- firstly, to whether the jobholder works predominantly indoors or outdoors - read the introductory sentences under the level definitions before the dot points to determine the starting point for the assessment of demands – if the jobholder works predominantly indoors start at A
- secondly, to the extent of exposure to weather conditions if the jobholder is predominantly working outdoors in the course of normal working – read the introductory sentences under the level definitions before the dot points to determine the starting point for the assessment of demands – if the jobholder works predominantly outdoors, but can take shelter from adverse weather, start at B. If the jobholder works predominantly outdoors exposed to all weathers, start at C
- thirdly, to the extent to which the jobholder is typically exposed to other unpleasant, disagreeable or hazardous conditions – illustrative examples are set out in the guidance
- finally, to the proportion of working time the jobholder is actually exposed to these unpleasant, disagreeable or hazardous conditions in the course of normal working.

N.B. The evaluation of overall job demand under this factor heading is established by a scoring matrix for each of the 'A', 'B' and 'C' starting points combined with the degree of exposure to 'unpleasant, disagreeable or hazardous' conditions, and the proportion of working time when the exposure is present, to assess:

- Firstly, the DEGREE of exposure in 5 increments:
 - Unpleasant
 - Unpleasant and mildly disagreeable
 - Disagreeable or mildly hazardous
 - Very disagreeable or hazardous
 - Extremely disagreeable or very hazardous
- Secondly, the PROPORTION OF WORKING TIME that the jobholder is normally exposed in 5 increments:
 - Up to 20%
 - 20 – 40%
 - 40 – 60%
 - 60- 80%
 - Over 80%

The matrix provides for 64 possible combinations of the elements of assessment, i.e. the 3 starting points plus 5 different degrees of demands and the 5 different proportions of working time. However, each of the increments in demand does NOT equate to a 'step change' in terms of the definitions of the 5 levels available under this factor heading. For example, the Scottish Job Analyst Team's (SJAT) assessment of demand for a job that involves working predominantly 'INDOORS' i.e. an 'A' starting point, with exposure to 'UNPLEASANT' conditions for 'up to 20%' of working time is Level 1. In their view, exposure to these conditions for 'more than 20% and up to 40%' of working time did not justify a Level 2; nor did exposure for more

than '40% and up to 60%' of working time. Only when exposure to these conditions would normally be for the majority time, i.e. 'more than 60%' did the SJAT consider that a 'step change' in demand to Level 2 was justified.

Therefore, the outputs of the scoring matrix for each of the 'A', 'B' and 'C' starting points are combined into 43 (rather than 64) statements across the definitions in the 5 factor levels; and there are 3 broad step changes in demand, i.e.:

- Up to X% - for example, 'up to 40%'
- More than X% and up to Y% - for example, 'more than 40% and up to 80%'
- More than Y% - for example, 'more than 80%'

Indoor/Outdoor Work

Outdoor work generally involves more exposure to disagreeable conditions than indoor work, but consideration must be given to all other features, for example:

- the extent to which the work can be organised **by the jobholder** to lessen the exposure to unpleasant conditions, and the level of control over the conditions;
- whether or not the outdoor work can be organised to minimise exposure to unpleasant conditions, e.g. the nature and availability of shelter;
- other unpleasant aspects e.g. fumes, smells, noise;
- whether or not the indoor work involves exposure to heat or cold.

Where a job is split between indoor and outdoor work, the frequency of each, and any other relevant features, e.g. travel/transport facilities, should be taken into account.

"CAN TAKE SHELTER" means the jobholder can undertake alternative duties in an indoor or sheltered environment to avoid adverse weather, for example, a gardener can continue working in the nursery when it is too wet to work outside.

"EXPOSED TO ALL WEATHERS" means the jobholder CANNOT stop work due to adverse conditions, for example, school crossing patroller.

Degree of Demand

The factor has five degrees of demand covering a range of environmental conditions from "unpleasant" to "very hazardous". The emphasis is on the **degree of unpleasantness or discomfort** encountered, which is affected by the frequency, intensity and duration of exposure to particular conditions or combinations of conditions. Health and Safety regulations and requirements are assumed to be met by both the employer and the employee.

"UNPLEASANT" conditions would include adverse temperature, adverse noise or uncomfortable clothing required to perform duties.

"UNPLEASANT AND MILDLY DISAGREEABLE" conditions would include working with unpleasant substances and/or mildly disagreeable odours e.g. assisting people to use the toilet or the need to wear light protective clothing such as latex gloves.

"DISAGREEABLE OR MILDLY HAZARDOUS" conditions would include being exposed to disagreeable or mildly hazardous substances / odours such as fumes, dust, chemicals, e.g. any job required to wear protective clothing such as a hard hat or face mask.

"VERY DISAGREEABLE OR HAZARDOUS" conditions would include being exposed to waste, dirt, working in live traffic, etc, e.g. cleaning incontinent clients/changing colostomy bags, digging road trenches or requiring PPE to mitigate against a specific potential hazard such as breathing apparatus (escape set) or wearing heavier protective clothing such as fire retardant clothing.

"EXTREMELY DISAGREEABLE OR VERY HAZARDOUS" conditions would include working in an abattoir (e.g. for inspection/visits) or in a refuse tip etc.

N.B. Any matters covered by Control of Substances Hazardous to Health (CoSHH) are deemed to be hazardous to a certain extent, ranging from mildly disagreeable to very hazardous.

Personal Comfort Levels - the degree and nature of the unpleasantness, and the frequency and duration with which it is encountered should be assessed, rather than individual responses to these, which vary. For example, some people are better at withstanding cold, or prefer heat. Responses may also vary with the familiarity with the condition, for example, some people become accustomed to an odious human or environmental smell.

Proportion of Working Time - consideration is also given to the normal cycle of work of the job to identify an appropriate period of time from which to determine the "proportion" during which the jobholder is exposed, for example, part of: a shift, a day, a week, a month, quarterly, annually etc. For example, an average of one day per week would equate to 20% of working time, two weeks a month would equate to 50% of working time etc.

Hazards / Risk of Injury

The Scheme takes account of hazards / risks arising directly from the demands of the job, which normally have been identified by risk assessment. It assumes that all appropriate precautions and safeguards are taken under Health & Safety regulations in relation to the Employer's duty of care, for example, provision of special training, protective measures and clothing, personal safety devices and safety systems and procedures for situations such as lone working or working in confined spaces. PPE is provided to mitigate the potential hazards that the jobholder is likely to be exposed to but it does not remove the hazard; and exposure to the potential hazard should still be taken into account in the assessment. The nature of the PPE provided should help indicate the nature of the potential hazard. The Scheme also assumes that the employee fulfils their responsibility to apply their training in practice, utilise personal protective equipment/clothing, follow defined procedures, and ensure they implement safe working systems and practices. Therefore, for example, passive smoking should not be taken into account as it is not a demand of the job but a health & safety issue.

N.B. 'Lone working' does not mean working alone but refers to undertaking work which requires safe working systems to be in place such as being accompanied by another person or an hourly 'call-in' to a control operator when on site or visiting non-Council premises. A 'confined space' is not necessarily a small space but may be one defined as 'confined' in terms of Health & Safety regulations, e.g. a space in which gas could build up.

The assessment of hazards and risk of injury should take into account the likelihood of such incidents occurring. This may vary between similar jobs, depending on their precise nature, location and degree of isolation.

FACTOR 1 - WORKING ENVIRONMENT

This factor considers the predominant physical environment in which the job is normally carried out.

It covers exposure to disagreeable, unpleasant, uncomfortable or hazardous working conditions such as dust, dirt, temperature extremes and variations, humidity, noise, vibration, fumes and smells, human or animal waste, steam, smoke, grease or oil, inclement weather; and discomfort arising from the requirement to wear protective clothing.

The factor also considers hazardous aspects of the working environment which are unavoidable and integral to the job, such as the risk of illness or injury arising from exposure to diseases, toxic substances, machinery, lone working or work locations. Health and safety regulations and requirements are assumed to be met by both the employer and the employee.

The factor takes into account the nature and degree of unpleasantness or discomfort, the frequency and duration of exposure to particular conditions in the course of normal working; and the effect of variations or combinations of disagreeable conditions.

FACTOR 1 - WORKING ENVIRONMENT

Level	Definition
1	<p>A. The job involves working predominantly indoors or travelling between locations, and normally involves exposure to:</p> <ol style="list-style-type: none"> 1. Unpleasant working conditions for up to 60% of working time 2. Unpleasant and mildly disagreeable conditions for up to 40% of working time 3. Disagreeable or mildly hazardous conditions for up to 20% of working time <p>OR</p> <p>B. The job involves working predominantly outdoors, but sheltered, and normally involves exposure to:</p> <ol style="list-style-type: none"> 4. Unpleasant or mildly disagreeable conditions for up to 40% of working time 5. Disagreeable or mildly hazardous conditions for up to 20% of working time

FACTOR 1 - WORKING ENVIRONMENT

Level	Definition
2	<p>A. The job involves working predominantly indoors or travelling between locations, and normally involves exposure to:</p> <ol style="list-style-type: none"> 1. Unpleasant conditions for more than 60% of working time or 2. Unpleasant and mildly disagreeable conditions for more than 40% and up to 80% of working time or 3. Disagreeable or mildly hazardous conditions for more than 20% and up to 60% of working time or 4. Very disagreeable or hazardous conditions for up to 40% of working time or 5. Extremely disagreeable or very hazardous conditions up to 20% of working time <p>OR</p> <p>B. The job involves working predominantly outdoors, but sheltered, and normally involves exposure to:</p> <ol style="list-style-type: none"> 6. Unpleasant or mildly disagreeable conditions for more than 40% and up to 80% of working time or 7. Disagreeable or mildly hazardous conditions for more than 20% and up to 60% of working time or 8. Very disagreeable or hazardous conditions for up to 40% of working time or 9. Extremely disagreeable or very hazardous conditions for up to 20% of working time <p>OR</p> <p>C. The job involves working predominantly outdoors exposed to all weather conditions, and normally involves exposure to:</p> <ol style="list-style-type: none"> 10. Unpleasant or mildly disagreeable conditions for up to 40% of working time 11. Disagreeable or mildly hazardous conditions for up to 40% of working time 12. Very disagreeable or hazardous conditions for up to 20% of working time 13. Extremely disagreeable or very hazardous conditions for up to 20% of working time

FACTOR 1 - WORKING ENVIRONMENT

Level	Definition
3	<p>A. The job involves working predominantly indoors or travelling between locations, and normally involves exposure to:</p> <ol style="list-style-type: none"> 1. Unpleasant and mildly disagreeable conditions for more than 80% of working time or 2. Disagreeable or mildly hazardous conditions for more than 60% and up to 80% of working time or 3. Very disagreeable or hazardous conditions for more than 40% and up to 60% of working time or 4. Extremely disagreeable or very hazardous conditions for more than 20% and up to 40% of working time <p>OR</p> <p>B. The job involves working predominantly outdoors, but sheltered, and normally involves exposure to:</p> <ol style="list-style-type: none"> 5. Unpleasant or mildly disagreeable conditions for more than 80% of working time or 6. Disagreeable or mildly hazardous conditions for more than 60% and up to 80% of working time or 7. Very disagreeable or hazardous conditions for more than 40% and up to 60% of working time or 8. Extremely disagreeable or very hazardous conditions for more than 20% and up to 40% of working time <p>OR</p> <p>C. The job involves working predominantly outdoors exposed to all weather conditions and normally involves exposure to:</p> <ol style="list-style-type: none"> 9. Unpleasant or mildly disagreeable conditions for more than 40% and up to 60% of working time or 10. Disagreeable or mildly hazardous conditions for more than 40% and up to 60% of working time or 11. Very disagreeable or hazardous conditions for more than 20% and up to 40% of working time or 12. Extremely disagreeable or very hazardous conditions for more than 20% and up to 40% of working time

FACTOR 1 - WORKING ENVIRONMENT

Level	Definition
4	<p>A. The job involves working predominantly indoors or travelling between locations, and normally involves exposure to:</p> <ol style="list-style-type: none"> 1. Disagreeable or mildly hazardous conditions for more than 80% of working time <p>or</p> <ol style="list-style-type: none"> 2. Very disagreeable or hazardous conditions for more than 60% of working time <p>or</p> <ol style="list-style-type: none"> 3. Extremely disagreeable or very hazardous conditions for more than 40% and up to 80% of working time <p>OR</p> <p>B. The job involves working predominantly outdoors, but sheltered, and normally involves exposure to:</p> <ol style="list-style-type: none"> 4. Disagreeable or mildly hazardous conditions for more than 80% of working time <p>or</p> <ol style="list-style-type: none"> 5. Very disagreeable or hazardous conditions for more than 60% of working time <p>or</p> <ol style="list-style-type: none"> 6. Extremely disagreeable or very hazardous conditions for more than 40% and up to 80% of working time <p>OR</p> <p>The job involves working predominantly outdoors exposed to all weather conditions and normally involves exposure to:</p> <ol style="list-style-type: none"> 7. Unpleasant or mildly disagreeable conditions for more than 60% of working time <p>or</p> <ol style="list-style-type: none"> 8. Disagreeable or mildly hazardous conditions for more than 60% of working time <p>or</p> <ol style="list-style-type: none"> 9. Very disagreeable or hazardous conditions for more than 40% and up to 80% of working time <p>or</p> <ol style="list-style-type: none"> 10. Extremely disagreeable or very hazardous conditions for more than 40% and up to 80% of working time

FACTOR 1 - WORKING ENVIRONMENT

Level	Definition
<p align="center">5</p>	<p>A. The job involves working predominantly indoors or travelling between locations, and normally involves exposure to:</p> <p>1. Extremely disagreeable or very hazardous conditions for more than 80% of working time</p> <p>OR</p> <p>B. The job involves working predominantly outdoors, but sheltered, and normally involves exposure to:</p> <p>2. Extremely disagreeable or very hazardous conditions for more than 80% of working time</p> <p>OR</p> <p>C. The job involves working predominantly outdoors exposed to all weather conditions and normally involves exposure to:</p> <p>3. Very disagreeable or hazardous conditions for more than 80% of working time</p> <p>or</p> <p>4. Extremely disagreeable or very hazardous conditions for more than 80% of working time</p>

FACTOR 2 – PHYSICAL CO-ORDINATION

Scope of Factor

This factor considers the **predominant** demand for physical skills and co-ordination required to do the job in the course of **normal working**, for example, in the operation of hand tools and other equipment. This factor takes into account the skills required and the demands arising from the need to achieve specified standards of speed and physical precision in terms of dexterity and/or co-ordination. The final level score under this heading depends on a number of elements within the level definition in relation to the step changes in demand.

Nature of Demand

"**Manual or finger dexterity**" for example, to use any tools or equipment or to use a keyboard/touchscreen.

"**Hand-eye co-ordination**" for example, to use a microfiche, for pruning, to monitor CCTV screens or while copy typing.

"**Co-ordination of limbs**" for example, for driving, digging or operating cleaning equipment.

"**Use of the senses**" for example, for audio typing, cooking or inspecting work.

Application of Level Definitions

The factor takes account of the fact that many jobs require a combination of different types of physical co-ordination in the course of normal working. The overall demands of the job are assessed in 3 steps:

1. According to the predominant demand for physical co-ordination required as part of the normal routine, i.e. driving as an occupational requirement, keyboarding or other activities - this provides the first score for the assessment of the overall demands under this factor heading.
2. Consideration should also be given to any other demands for physical co-ordination required as part of the normal routine, i.e. driving in addition to keyboarding or other activities because it is not an occupational requirement - this provides the second score for the assessment of the overall demands under this factor heading.
3. The overall assessment of the physical effort demands of the job will be scored according to - whichever of the level assessments is the **higher** as demands are considered separately under this factor heading as they are not cumulative.

Previous Requirements

The level of skill required should be that needed for the job, and **not** any other level required for a previous career position. Thus, a supervisor of drivers only needs driving skills if still required to drive, or to train others. The same applies to word processing skills for an office manager.

Activities involving **limited** dexterity or co-ordination, with no requirement for developed physical skills, for example, standing, sitting, walking, using a pen, pencil or ruler, using a telephone, are covered by **Level 1**.

Degree of Demand

Driving Skills

The extent to which driving skills are **required** for carrying out the duties of the job is considered. Where it is an occupational requirement because driving is the predominant requirement of the job, the jobholder would be unable to continue to undertake the **full range** of duties of their job, if for any reason, they were no longer able to drive, e.g. Courier, Chauffeur, Care Attendant/Driver required to drive clients to school/day centre using the establishment mini-bus etc.

Consideration is also given where driving is typically a recruitment criteria or a means of managing a workload, e.g. driving to make client visits, travelling between designated areas of responsibility etc.

The level of driving skills may be higher when account is taken of the size and complexity of the vehicle, any ancillary equipment attached, or the need to tow or manoeuvre vehicles. Any of these aspects may increase the demand for precision particularly, in the extent of physical co-ordination required. It should be borne in mind that the overall assessment of the physical co-ordination required by a job may include a combination of driving and other work requiring precision and/or speed.

The "MODERATE" degree of co-ordination of limbs and senses required to drive an ordinary car, van or similar vehicle are covered by **Level 2**. The "CONSIDERABLE" degree of co-ordination of limbs and senses required to tow or manoeuvre while using these vehicles, **or** to operate other propelled equipment or more complex vehicles such as a tractor or dumper including attachments will typically be covered by **Level 3**. The "HIGH" degree of co-ordination of limbs and senses required to tow or manoeuvre large or articulated vehicles will typically be covered by **Level 4**, while the "VERY HIGH" degree of co-ordination of limbs and senses required to drive and fully operate equipment such as a mechanical digger or equivalent plant (including those controlled by joystick or levers) will typically be covered by **Level 5**. These driving skills **must** be required as part of the normal routine of the job.

"OTHER PROPELLED EQUIPMENT" – such as mini-digger, ride-on mower etc

Keyboard Skills

These skills are considered where they are **required** for carrying out the job duties. The level of skill required may vary with the context, nature and purpose of the keyboard/touchscreen activities, and any time constraints.

- **Level 1** requires a "MINIMAL" degree of manual dexterity in the use of a keyboard/touchscreen with a limited number of digits, e.g. 2-finger operation i.e. not involving substantial keyboarding, for example, using the cursor to interrogate an information system, without any time constraints, and with the opportunity to amend significantly.
- **Level 2** - requires a "MODERATE" degree of manual dexterity in the use of the keyboard/touchscreen, for example, administrative or research jobs involving use of computers for some aspects of the work. This covers general data input and "basic keyboarding" for general clerical or administrative tasks, i.e. self-taught but NOT audio or touch typing, for example, to produce standard word processed documents, simple graphics or desktop publishing etc for self and colleagues; or to use CAD or GIS systems for reference purposes

- **Level 3** - requires a “CONSIDERABLE” degree of manual dexterity, or involves both moderate dexterity and speed, where the keyboard skills are integral to the main duties as opposed to using the system for clerical or administrative tasks, for example, to undertake computer programming, systems analysis or, operate CAD or GIS systems for their designated purpose.
- **Level 4** requires a “HIGHER” degree of manual dexterity, or involves both considerable dexterity and speed required by specialist keyboard operators, such as bulk data input, e.g. batch processing or word processing operators applying precision and speed in order to complete tasks to the required standards and timescales. This includes "typing", i.e. touch or audio-typing, generally to produce complex word processed documents, complex graphics etc on behalf of others.

N.B. ‘PRECISION’ in relation to keyboarding activities refers to the accuracy of key-stroking.

“KEYSTROKING TO PRE-DETERMINED STANDARDS” refers to the requirement to work at set levels of speed and accuracy, e.g. typing at more than 50 words per minute. Jobholders may be required to demonstrate proficiency, for example, through achievement of a recognised secretarial certificate or by undertaking a keyboard skills test to demonstrate the required level of speed and accuracy. This does NOT refer to software or keyboard familiarity tests that do not involve keystroking to pre-determined standards/pace.

Other Activities

N.B. Excluding driving and keyboarding

Consideration is given to the **speed** with which the physical skills are exercised, **not** to the speed of the outcome. For example, pressing a button to release a rocket set to fly faster than the speed of sound requires only limited precision and speed. Consideration should be given to whether there is anything inherent in the task that requires its completion at a pre-determined rate of work which is outwith the jobholder’s control, for example, completing a repetitive task or part of an automated process within a defined time interval, e.g. in order to fasten a nut to a bolt on an assembly line every 10 seconds the jobholder requires to work at the pre-determined speed of ‘six times per minute.

This relates to the standard level required for competent performance of the job duties. Any higher rates achieved, for example, in order to meet performance targets, should **not** be taken into account, particularly if achievement of standards or targets is remunerated separately, for example, through the payment of a performance bonus. Similarly, work carried out at speed to meet a deadline should not be considered under this factor heading but under the work-related pressure aspects of the ‘Concentration’ factor heading.

Consideration is also given to the need for **precise** action in relation to activities **other** than driving or keyboarding, irrespective of job context, in relation to the nature of the physical movements (e.g. of hands, fingers, limbs or senses), **not** to the accuracy of the end result. For example, the precise movement required to strike a nail with a hammer not the accuracy with which the nail is positioned.

"LIMITED or MINIMAL" precision, for example, controlling a pencil or pen, or using push button controls on a machine, power tools or a piece of equipment.

"MODERATE" precision of hands, arms, possibly feet and eyes is required to undertake the relevant tasks, for example, using a spanner, hammer or screwdriver, for controlling a brush, mop, vacuum cleaner, trolley or similar tools or equipment, or to load a dishwasher.

"CONSIDERABLE" precision of fingers, hands, arms, possibly feet and eyes is required to undertake the relevant tasks, for example, use of a strimmer, use of a chisel or fine paintbrush, use of a knife to peel or chop vegetables, exact control of tools or equipment, for example, to work on delicate plant, machinery or equipment; or where there is restricted access.

"HIGH" precision where exact positioning of fingers, hands, arms, possibly feet and eyes is important in undertaking the relevant tasks, for example, in the use of tools or equipment for intricate or detailed work such as calibration, setting or measuring other tools or equipment.

"VERY HIGH" precision where exact positioning of fingers, hands, arms, possibly feet and eyes is crucial in undertaking the relevant tasks, e.g. using laser equipment.

Consequences of Error

The outcome of the physical skills and co-ordination, including the consequences of error, **should not be taken into account here**, but under the appropriate Responsibility factor. If the same degree of precision and speed is required to produce items worth £100 and £100,000, the jobs should be assessed at the same level under the 'Physical Co-ordination' factor heading.

FACTOR 2 - PHYSICAL CO-ORDINATION

This factor considers the predominant demands for physical co-ordination required to do the job.

It covers manual and finger dexterity, hand-eye co-ordination, and co-ordination of limbs and/or senses required in the course of normal working.

The factor takes into account the nature and degree of co-ordination required, and any need for speed or precision in undertaking the specified task.

FACTOR 2 – PHYSICAL CO-ORDINATION

Level	Definition
1	There are limited or minimal requirements for developed physical skills or co-ordination in the course of normal working, for example, the dexterity for 2-finger typing
2	<p>The work mainly requires:</p> <ol style="list-style-type: none"> 1. moderate degree of co-ordination of limbs and senses required to drive an ordinary car, van or similar vehicle, or other propelled equipment <p>or</p> <ol style="list-style-type: none"> 2. moderate dexterity for basic keyboarding <p>or</p> <ol style="list-style-type: none"> 3. minimal precision and speed in the use of dexterity, co-ordination and/or senses when undertaking other activities. <p>or</p> <ol style="list-style-type: none"> 4. moderate precision in the use of these skills when undertaking other activities. <p>or</p> <ol style="list-style-type: none"> 5. a combination of demands relating to one element of either keyboarding driving or other activities requiring physical co-ordination as defined at this level and another of those elements as defined at this or a lower level.

FACTOR 2 – PHYSICAL CO-ORDINATION

Level	Definition
3	<p>The work mainly requires:</p> <ol style="list-style-type: none"> 1. considerable degree of co-ordination of limbs and senses to tow or manoeuvre while driving an ordinary car, van or similar vehicle, or other propelled equipment <p>or</p> <ol style="list-style-type: none"> 2. considerable degree of co-ordination of limbs and senses to operate more complex vehicles such as a tractor or dumper including attachments <p>or</p> <ol style="list-style-type: none"> 3. moderate dexterity and speed for keyboarding <p>or</p> <ol style="list-style-type: none"> 4. considerable dexterity and co-ordination for keyboarding <p>or</p> <ol style="list-style-type: none"> 5. moderate precision and speed in the use of dexterity, co-ordination and/or senses when undertaking other activities <p>or</p> <ol style="list-style-type: none"> 6. considerable precision in the use of these skills when undertaking other activities. <p>or</p> <ol style="list-style-type: none"> 7. a combination of demands relating to one element of either keyboarding, driving, or other activities requiring physical co-ordination as defined at this level and another of those elements as defined at this or a lower level.
4	<p>The work mainly requires:</p> <ol style="list-style-type: none"> 1. high degree of co-ordination of limbs and senses to tow or manoeuvre large or articulated vehicles <p>or</p> <ol style="list-style-type: none"> 2. considerable dexterity and speed for keyboarding <p>or</p> <ol style="list-style-type: none"> 3. high dexterity for keyboarding <p>or</p> <ol style="list-style-type: none"> 4. considerable demands for precision and speed in the use of dexterity, co-ordination and/or senses when undertaking other activities <p>or</p> <ol style="list-style-type: none"> 5. high demands for precision in the use of these skills when undertaking other activities. <p>or</p>

FACTOR 2 – PHYSICAL CO-ORDINATION

Level	Definition
	6. a combination of demands relating to one element of either keyboarding, driving or other activities requiring physical co-ordination as defined at this level and another of those elements as defined at this or a lower level.
5	<p>The work mainly requires:</p> <p>1. very high degree of co-ordination of limbs and senses to drive and fully operate equipment such as a mechanical digger or equivalent plant</p> <p>or</p> <p>2. high demands for precision and speed in the use of dexterity, co-ordination and/or senses when undertaking other activities</p> <p>or</p> <p>3. very high demands for precision in the use of these skills when undertaking other activities.</p> <p>or</p> <p>4. a combination of demands relating to one element of either keyboarding, driving or other activities requiring physical co-ordination as defined at this level and another of those elements as defined at this or a lower level.</p>

FACTOR 3 - PHYSICAL EFFORT

Scope of Factor

This factor considers the type, amount, continuity and frequency of the physical effort required to do the job, i.e. effort that makes the jobholder physically fatigued. It covers stamina as well as strength.

It takes into account all forms of bodily effort, for example, that required for standing and walking, lifting and carrying, pulling and pushing. It also includes the physical demands involved in working in awkward positions, for example, bending, crouching, stretching; for sitting, standing or working in a constrained position; and for maintaining the required pace of work.

Tasks or activities which are undertaken mainly in a **SEDENTARY** position and allow for considerable flexibility of movement (i.e. not constrained) involve a basic degree of physical effort, as does a limited requirement for standing, walking, bending or stretching, or an occasional need to lift or carry items.

Application of the Level Definitions

The factor takes account of the fact that many jobs require a combination of different types of physical effort in the course of normal working. The overall demands of the job are assessed in the 3 steps:

1. According to the **greatest** demand for physical effort involved as part of the normal routine in terms of the **nature and degree** of demand, i.e. the heaviest physical demand of the job. This demand will generally be required less frequently or for a shorter duration than other demands. The guidance on the following pages is set out in descending order of the activities requiring greatest to least effort – with 'lifting/carrying' being of greatest demand and 'standing/walking' being of least demand. Accordingly, when determining the nature of the greatest demand a process of elimination is required, starting at the top of the guidance, consideration should be given to whether:

- 'lifting/carrying' is part of the usual routine of the job; and if it is not, then:
- whether 'pushing/pulling' is part of the usual routine of the job; and if it is not, then:
- whether a need to 'apply physical effort' is part of the usual routine of the job; and if it is not, then:
- whether working in 'awkward positions' is part of the usual routine of the job; and if it is not, then:
- whether 'working in constrained positions' is part of the usual routine of the job.

N.B. Typically, 'standing/walking' will not be the heaviest part of the job.

Having determined the nature of the greatest demand consideration should be given to the degree of demand, i.e. limited, considerable, high and very high.

N.B. each of these terms is defined specifically in the following guidance in relation to the nature of the greatest demand

Consideration should then be given to the proportion of working time for which the greatest demand required as part of the usual routine of the job is typically required, i.e. occasionally, periodically, regularly, frequently, or on an on-going or continuous basis.

N.B. Typically the heaviest physical demands of the job will not be required on either an on-going or continuous basis.

The combination of the nature and degree of the greatest or heaviest physical effort required and the typical proportion of working time for which it is required can then be identified in one of statements in the level definitions - this provides the 'X' score for the matrix assessment of the overall demands under this factor heading.

2. Consideration should be given to the **other** demands for physical effort involved as part of the normal routine, i.e. these are likely to be the MAIN physical demands of the job which will generally require less effort but will generally be required more **frequently** or for a longer **duration** than the greatest demand of the job.

As the guidance is set out in descending order of the activities requiring greatest to least effort, when determining the nature of the main demands the same process of elimination is required but in reverse order, starting at the bottom of the guidance, consideration should be given to whether:

- 'standing/walking' is the main physical demand of the job; and if it is not, then:
- whether 'working in constrained positions' is the main physical demand of the job; and if it is not, then:
- whether 'working in awkward positions' is the main physical demand of the job; and if it is not, then:
- whether a need to 'apply physical effort' is the main physical demand of the job; and if it is not, then:
- whether 'pushing/pulling' is the main physical demand of the job; and if it is not, then:
- whether 'lifting/carrying' is the main physical part of the job.

N.B. The same nature of demand should NOT be identified for both the greatest and the main demand; and the main demand should not appear above the greatest demand in the order of the guidance.

Consideration should then be given to the proportion of working time for which the main physical demand of the job is required, i.e. occasionally, periodically, regularly, frequently, or on an on-going or continuous basis.

N.B. Typically the main physical demands of the job will not be required on either an occasional or periodic basis.

The combination of the nature and degree of the main physical effort required and the typical proportion of working time for which it is required can then be identified in one of the statements in the level definitions - this provides the 'Y' score for the matrix assessment of the overall demands under this factor heading.

3. The overall assessment of the physical effort demands of the job will be scored according to the matrix which balances the 'X' and 'Y' scores. For most jobs this will be whichever of the level assessments is the higher – either the X or Y score. **N.B.** in practice, it may be necessary to assess a range of different physical demands in the job to establish which are the greatest and which are the main demands. However, some jobs require the **same** level of physical effort in terms of **both** the greatest demands and any other demands, as these can be cumulative demands, for example, lifting/carrying while standing/walking, and in these cases the **overall** level of demand is considered to be equivalent to the **next** level, above Level 3. For example, the overall level of demands for a job primarily involving greatest effort at a Level 4, where the other demands are also at Level 4, would be considered as equivalent to the demands at Level 5.

Degree of Demand

Lifting / Carrying

The level of lifting or carrying effort should be a TYPICAL feature of the job, not just undertaken occasionally.

"LIMITED" lifting or carrying involves effort slightly above normal. For example, lifting or carrying packs of paper, an empty bucket or a light piece of equipment (e.g. kitchen tools, empty pans or containers).

"CONSIDERABLE" lifting or carrying involves effort significantly above normal. For example, lifting or carrying a box of files, a bucket of water, a full pan or similar container or a piece of training or similar equipment.

"HIGH" lifting or carrying involves effort substantially above normal. For example, lifting or carrying large containers of food or similar, half full dustbins, bags of compost, children with physical disabilities or equivalent.

"VERY HIGH" lifting or carrying involves effort greatly above normal. For example, lifting or carrying full dustbins, sacks of potatoes or soil, teenagers or adults with physical disabilities or equivalent.

Pushing / Pulling

The level of pushing or pulling effort should be a TYPICAL feature of the job, not just undertaken occasionally.

"LIMITED" pushing or pulling involves effort slightly above normal. For example, sweeping or raking leaves, pulling empty wheelie bins, pushing or pulling an empty trolley or wheelchair, or some other piece of equipment where there is little resistance.

"CONSIDERABLE" pushing or pulling involves effort significantly above normal. For example, pushing or pulling a laden trolley, pulling full domestic wheelie bins, a wheelchair with a child or adult occupant, a piece of equipment where there is resistance.

"HIGH" pushing or pulling involves effort substantially above normal. For example, pushing or pulling a well laden trolley, a wheelchair with a heavy adult occupant, a piece of equipment where there is strong resistance (e.g. sweeping mud or ice).

"VERY HIGH" pushing or pulling involves effort greatly above normal. For example, pushing or pulling a very heavily laden trolley, a bed with a heavy adult occupant, a piece of equipment which in itself is very heavy or where there is very strong resistance (e.g. pulling full, commercial sized wheelie bins).

Weights

The weight being lifted/carried, pushed/pulled etc should be considered regardless of the physical characteristics of the jobholder and whether the duties are normally carried out by women or by men; or by small people or large people; or by fit or unfit people. So, the physical effort required to lift a sack of cement or a sack of potatoes is the same, even if it is lifted and carried without obvious exertion by a tall, fit, young person.

Where mechanical aids or assistance are available, these should be taken into account when assessing the degree of demand. For instance, other things being equal, moving sacks of potatoes with the aid of a trolley involves less demand than lifting and carrying the sacks over the same distance.

Applied Physical Effort

This relates to those situations where physical force has to be applied, such as scrubbing, sawing, digging, etc. The level of applied physical effort should be a TYPICAL feature of the job, not just undertaken occasionally.

"LIMITED" applied physical effort is only slightly above normal. For example, wiping tables or similar surfaces with a damp cloth, dusting hand-high shelves etc.

"CONSIDERABLE" applied physical effort is significantly above normal. For example, rubbing or scrubbing tables or similar surfaces, painting walls or doors with brush or roller, raking tilled soil, etc.

"HIGH" applied physical effort is substantially above normal. For example, scrubbing floors, sawing wood, digging light soil, laying small paving stones, etc.

"VERY HIGH" applied physical effort is greatly above normal. For example, digging heavy soil or soil below ground level, sawing trees with chainsaw, laying full-sized paving stones, etc.

Awkward Positions

Working in awkward positions should be a TYPICAL feature of the job, not just adopted occasionally.

"AWKWARD POSITIONS" include those which require unusual bending, crouching or stretching, as well as the more obvious situations such as working while leaning over, round or under an obstruction or while lying on one's back, etc.

"SLIGHTLY" awkward positions are those which differ from normal walking, standing or sitting, but to a LIMITED degree. For example, leaning forwards, backwards or sideways, stretching arms forwards or upwards.

"DISTINCTLY" awkward positions are those which differ from normal walking, standing or sitting, but to a CONSIDERABLE degree. For example, bending forwards, backwards, or sideways, crouching, stretching upwards using arms and/or legs.

"VERY" awkward positions are those which differ from normal walking, standing or sitting, but to a HIGH degree, for example, kneeling, crouching under an object or in a confined space, lying on back or front.

Working in Constrained Positions

"CONSTRAINED POSITIONS" are those where the jobholder HAS TO remain in a fixed and/or tensed position, for a prolonged period of time, such as sitting at a switchboard attached to the console by an earpiece or mouthpiece, sitting in a vehicle driving seat constrained by steering wheel and other controls when driving is an occupational requirement rather than a means of managing a workload, standing in a rigid position to operate equipment, working up a ladder, etc.

Working in constrained positions is considered as requiring a LIMITED degree of physical effort.

Standing/Walking

STANDING/WALKING is considered as requiring a LIMITED degree of physical effort.

Frequency and Continuity

The level definitions incorporate a scale of frequency and continuity intended to reflect the overall average demand in the job, even if it does not arise every day, as follows:

- **Occasional** - infrequently and/or for a short period of time i.e. occurring on average less than 0.5 days or 0.5 shifts in 10 or up to 5% of working time over the year as a whole. As a proportion of working time this equates to less than 5% on average based on a standard full time week.
- **Periodic** - more frequent than occasional, but less frequent than regular; effort not necessarily associated with normal job duties. As a proportion of working time this equates to between 5 - 20% on average.
- **Regular** - in the dictionary sense of repeated; would usually be associated with normal job duties. As a proportion of working time this equates to between 21 - 40% on average.
- **Frequent** - in the dictionary sense; certainly associated with normal, everyday job duties. As a proportion of working time this equates to between 41 - 60% on average.
- **Ongoing** - associated with the job duties undertaken for most of the working shift. As a proportion of working time this equates to between 61 - 80% on average.
- **Continuous** – or almost continuous; associated with the job duties undertaken for majority of the working shift. As a proportion of working time this equates to **more** than 80% on average.

NOTE: Care should be taken to ensure that when added together the lower ranges of both the 'greatest' and the 'other' physical demands do NOT exceed 100%. When considering the relative proportion of working time that the jobholder spends undertaking the heaviest and main physical demands of the job care should be taken to consider what proportion of time, if any, is left unaccounted for, and whether this is appropriate in relation to the variety of physically demanding and other tasks/activities that make up the normal routine of the job. This is particularly relevant when jobholders drive or are otherwise sedentary as time spent driving or undertaking sedentary activities should be taken into consideration when calculating the proportions of working time that apply to the 'greatest' and 'other' physical demands under this factor heading.

Consideration should be given to the **normal** cycle of work of the job to identify an appropriate period of time from which to determine the "proportion" during which the jobholder experiences

the demand, for example, part of: a shift, a day, a week, a month, quarterly, annually etc. Demands over particular periods relate to the nature of the work, and **not** to the contractual hours of the jobholder.

It is assumed that all relevant Health and Safety Regulations are complied with. However, in considering the continuity of effort, breaks required by Health and Safety Regulations (for example, for VDU work or driving), or other recognised breaks, should **not** be treated as breaks in the period of effort.

FACTOR 3 - PHYSICAL EFFORT

This factor considers the strength and stamina required to do the job.

It covers all forms of physical effort required in the course of normal working, for example, standing, walking, lifting, carrying, pulling, pushing, working in awkward positions such as bending, crouching, stretching; for sitting, standing or working in a constrained position.

The factor takes account of the **greatest** demands on the jobholder in terms of the nature and degree of physical effort required, and the other **main** demands in terms of the frequency and duration of the physical effort required to do the job.

FACTOR 3 - PHYSICAL EFFORT

Level	Definition
1	<p>Tasks or activities are undertaken mainly in a sedentary position, and allow for considerable flexibility of movement. The greatest demand required as part of the usual routine of the job, involves primarily:</p> <p style="margin-left: 20px;">1 Limited physical effort on an occasional or periodic basis</p> <p style="margin-left: 20px;">or</p> <p style="margin-left: 20px;">2 Considerable physical effort on an occasional basis</p>
2	<p>The greatest demand required as part of the usual routine of the job, involves primarily:</p> <p style="margin-left: 20px;">1 Limited physical effort on a regular basis</p> <p style="margin-left: 20px;">or</p> <p style="margin-left: 20px;">2 Considerable physical effort on a periodic basis</p> <p style="margin-left: 20px;">or</p> <p style="margin-left: 20px;">3 A high degree of physical effort on an occasional basis</p>
3	<p>The greatest demand required as part of the usual routine of the job, involves primarily:</p> <p style="margin-left: 20px;">1 Limited physical effort on a frequent basis</p> <p style="margin-left: 20px;">or</p> <p style="margin-left: 20px;">2 Considerable physical effort on a regular basis</p> <p style="margin-left: 20px;">or</p> <p style="margin-left: 20px;">3 A high degree of physical effort on a periodic basis</p> <p style="margin-left: 20px;">or</p> <p style="margin-left: 20px;">4 A very high degree of physical effort on an occasional basis</p>

FACTOR 3 - PHYSICAL EFFORT

Level	Definition
4	<p>The greatest demand required as part of the usual routine of the job, involves primarily:</p> <p>1 Limited physical effort on an on-going or continuous basis</p> <p>or</p> <p>2 Considerable physical effort on a frequent basis</p> <p>or</p> <p>3 A high degree of physical effort on a regular or frequent basis</p> <p>or</p> <p>4 A very high degree of physical effort on a periodic or regular basis</p> <p>OR</p> <p>Both the jobholder's greatest and other requirements for strength and stamina are as described by the demands identified at Level 3.</p>
5	<p>The greatest demand required as part of the usual routine of the job, involves primarily:</p> <p>1 A considerable degree of physical effort on an on-going or continuous basis</p> <p>or</p> <p>2 A high degree of physical effort on an on-going or continuous basis</p> <p>or</p> <p>3 A very high degree of physical effort on a frequent, on-going or continuous basis</p> <p>OR</p> <p>Both the jobholder's greatest and other requirements for strength and stamina are as described by the demands identified at Level 4.</p>

FACTOR 4 - MENTAL SKILLS

Scope of Factor

This factor considers the range of thinking activities and mental skills required for the job, from choosing between options, through planning or scheduling to exercising judgement or creativity.

This factor evaluates the mental skills required by the job irrespective of the level of initiative and independence, or its level of responsibility, which are measured under other factor headings in the Scheme. For example, a computer programmer requires mental skills to design a suitable program for a specified purpose, but may not have made the decision for the program to be designed. The same may apply to an architect designing a building. In both cases, the level of mental skills may be high relative to the level of Initiative and Independence.

Under this factor heading, the importance or value to the organisation of the end result, e.g. the computer program or building, is **irrelevant** to the assessment of the mental skills required for the particular job.

Where a level definition includes a **range** of criteria for meeting the level of demand, the **majority** of the elements must be regular features of the job to justify scoring at that level. Where the job demonstrates only one aspect of the range of demands at a particular level, it will generally be assessed at a lower level.

Degree of Demand

Problem Solving

In the context of this factor, "**analytical**" has its normal dictionary meaning of:

"examining and identifying the components of the whole".

"ANALYTICAL" skills are those required for dissecting information, a problem or a situation into its component parts, in order to examine its essential elements as the basis for making a judgement or resolving a problem. For example, use of problem-solving techniques such as lateral thinking, diagnostics, process mapping, critical examinations, fishbone analysis etc.

"RESOLVE PROBLEMS" covers a range from applying existing procedures or rules, through the use of precedents, assessing options, to developing innovative solutions to one-off problems.

"MAKING CHOICES" - i.e. the jobholder can choose a course of action from a number of predetermined options.

"DIFFICULT" refers to non-routine problems or those which the jobholder considers not to be straightforward.

"SIMILAR" - i.e. the jobholder is required to interpret information and use judgement or creativity to decide which course of action to follow to find a solution for similar types of problems.

"VARIED" – means the jobholder is required to interpret and assess a range of different but straightforward problems to develop solutions.

"COMPLEX" means there is more than one way of interpreting the information. The information may also require assessment. For example, a range of operational/technical information **primarily** within a single discipline/function such as building control regulations.

"DIVERSE AND COMPLEX" information has several aspects, not all of which may be immediately apparent, so may require investigation of a number of sources and may be interpreted in more than one way. For example, information **primarily** of a multi-disciplinary or multi-functional nature, such as problems involving a range of strategic, financial, policy, legal, personnel and technical aspects.

"NOVEL" – covers original, unique, unusual or creative applications of tried and tested techniques, i.e. a non-textbook application

"SOURCE" – refers to the people, places or systems from which the jobholder seeks information relevant to the problem

"A NUMBER OF SIMILAR SOURCES" could be: several officers in the Council OR a number of different clients with similar circumstances OR various different reference books or manuals

"A VARIETY OF DIFFERENT SOURCES" might be: a client seeking help AND another officer in the Council AND a reference manual of some sort; OR a verbal report of the situation AND a personal inspection of the site AND legal advice

NOTE: Some problems or situations may require other skills for example, decision making which should be considered under the factor heading "Initiative and Independence", or interpersonal skills which should be considered under the factor heading "Communication Skills".

Planning

In the context of this factor, "**PLANNING**" has its normal dictionary definition of:

"the establishment of goals, policies and procedures for a social or economic unit",

rather than any specific meaning in the local authority context, for example, Town and Country Planning or Economic Development or the development of individual client 'care plans' which should be considered under the factor heading 'Responsibility for Services to Others'.

It must be the jobholder's personal responsibility to create the overall plan, but he/she does not need to have the authority to approve the plan's implementation. Plans need not be formally presented nor documented.

"UPDATING" includes amending a cyclical plan where many factors must be considered e.g. grounds maintenance plan, planned service maintenance programme.

"DEVELOP" in relation to strategies or plans refers to the need for the jobholder to look ahead and to determine the necessary series of activities or actions which would eventually ensure that the required outcomes are achieved within the required timescale, standard, budget etc

"RELATIVELY COMPLEX" - incorporating a greater number of variables about which there is less certainty, including factors outwith the Council's control.

"VERY COMPLEX" – requiring research, innovation and radical thinking

"EXTREMELY COMPLEX" – requires the ability to conceptualise, to envisage unknown variables, influencing factors and areas of uncertainty

NOTE: The preparation of annual budgets is **not** planning in this context but should be taken into account under the factor heading “Responsibility for Financial Resources”.

Planning Timescales

References to the timescale for solutions and planning relate to the period over which the plans are made, **not** to the durability of what is planned. Designing a particular structure, intended to stand for a hundred years, might take a matter of weeks to plan. However, the jobholder must think ahead in terms of the purpose or use of the structure. Planning to win and deliver a 5 year education catering contract might take months to plan, but the emphasis is on **how far ahead** the jobholder must think in terms of planning resources and activities, and the extent to which the jobholder must take account of variables with differing degrees of certainty.

In general, the following guidelines apply to planning timescales, unless otherwise specified:

“SHORT TERM” – generally over a period of up to 3 months

“MEDIUM TERM” – generally over a period of up to 1 year

“LONG TERM” – generally over a period of up to 3 years.

Scheduling

The planning process must not be confused with forward scheduling such as allocation of staffing rotas, setting dates for meetings, etc.

"FORWARD SCHEDULING" means putting dates or times against activities which are pre-set and which are not affected by the date chosen, for example:

- the allocating of staff to established rotas or arranging/confirming annual leave dates;
- deciding the dates for a series of visits to clients or to sites;
- setting dates for meetings or for papers to be presented.

"OWN WORKLOAD" includes scheduling activities for clients.

"SCHEDULING" refers to the activities of the jobholder and/or their team e.g. forward planning or scheduling routine work/rotas, developing a process flow chart etc.

FACTOR 4 - MENTAL SKILLS

This factor considers the predominant thinking requirement in the job.

It includes problem solving, options appraisal, creativity and design, innovation, imaginative and developmental skills, analytical and strategic thinking, research, planning, and the ability to conceptualise.

The factor takes into account the **predominant** nature and complexity of the mental tasks undertaken.

FACTOR 4 - MENTAL SKILLS

Level	Definition
1	<p>Problems may be referred upwards. However, the job predominantly requires mental skills to:</p> <p>1 choose between a limited number of clearly defined options</p> <p>and/or</p> <p>2 schedule activities in relation to the job holder's immediate workload.</p>
2	<p>The job predominantly requires mental skills to:</p> <p>1 interpret information or situations, and to solve generally similar problems.</p> <p>and/or</p> <p>2 schedule work and activities (for themselves and/or others) weeks in advance.</p>
3	<p>The job predominantly requires mental skills to:</p> <p>1 assess information or appraise situations and to solve varied problems or develop solutions or plan new or 'one-off' tasks months in advance.</p> <p>or</p> <p>2 update existing or 'rolling' plans and schedule cyclical activities for up to a year in advance</p> <p>or</p> <p>3 analyse complex information, problems or situations, and to contribute to the development of strategies or plans for implementation up to 3 years ahead</p>

FACTOR 4 - MENTAL SKILLS

Level	Definition
4	<p>The job predominantly requires mental skills to:</p> <p>1 create and maintain a plan for activities up to a year in advance</p> <p>or</p> <p>2 analyse complex information, problems or situations, and to contribute to the development of strategies or plans for implementation 3 years or more ahead</p> <p>or</p> <p>3 analyse complex information, problems or situations, and to develop strategies or plans requiring relatively complex planning activity</p> <p>or</p> <p>4 analyse diverse and complex information, problems or situations, and to contribute to the development of strategies or plans for implementation up to 3 years ahead</p>
5	<p>The job predominantly requires mental skills to:</p> <p>1 analyse complex information, problems or situations, and to develop strategies or plans requiring very complex planning activity</p> <p>or</p> <p>2 analyse diverse and complex information, problems or situations, and to contribute to the development of strategies or plans for implementation 3 years or more ahead</p> <p>or</p> <p>3 analyse diverse and complex information, problems or situations, and to develop strategies or plans requiring relatively complex planning activity</p>
6	<p>The job predominantly requires mental skills to:</p> <p>1 analyse complex information, problems or situations, and to develop strategies or plans requiring extremely complex planning activity</p> <p>or</p> <p>2 analyse diverse and complex information, problems or situations, and to develop strategies or plans requiring very complex planning activity</p>
7	<p>The job predominantly requires mental skills to:</p> <p>1 analyse diverse and complex information, problems or situations, and to develop strategies or plans requiring extremely complex planning activity</p>

FACTOR 5 – CONCENTRATION

Scope of Factor

This factor considers the nature, degree and duration of the concentration, mental alertness and attention required to do the job on a day-to-day basis, i.e. mental effort that makes the jobholder mentally fatigued.

It considers the nature of day-to-day work for which concentration must be sustained, the work-related pressures which may make concentration more difficult, and also the responsiveness required of the jobholder.

‘DAY TO DAY’ i.e. required on a daily basis or on alternate days. As a minimum requirement at least twice per week.

Attention

“MENTAL” – i.e. attention of the mind, as in thinking, calculating etc

“SENSORY” – i.e. seeing, hearing, touching, smelling or tasting.

- “GENERAL” mental or sensory attention is the level required for day-to-day activities, such as moving from one place to another OR that which the jobholder has to apply; such as when reading work instructions, completing work-recording documents, counting money or checking change, undertaking daily checks on equipment being used, hoeing, digging, painting walls etc.
- “ENHANCED” mental or sensory attention would include the checking of documents for completeness or correctness (possibly of simple arithmetic), matching or inputting data between different sources, undertaking inspections, taking measurements, preparing standard reports, carrying out arithmetic calculations (i.e. multiplication, division, fractions, percentages), completing detailed documentation, making electrical connections, pruning, painting window frames etc.
- “FOCUSED” mental or sensory attention is applied when the jobholder requires to be particularly alert, for example, when driving (as an occupational requirement rather than driving to where work is to be carried out) or working in traffic or supervising the actions of children/pool-users, concentrating on visual or aural activities such as audio-typing/operating CAD or GIS systems rather than using them for reference purposes OR that required for tasks such as designing complex spreadsheets/undertaking complex calculations involving mathematical formulae (i.e. algebra, trigonometry, geometry or calculus), ordering facts, findings, conclusions and recommendations in report writing or in the preparation of a presentation, undertaking research, reviewing case files for compliance purposes or to investigate formal complaints, electrical diagnostics, propagating, using chainsaws etc.

Work Related Pressure

This arises from features **outside the control of the jobholder**. The **degree** of pressure relates to the extent of control exercised by the jobholder, in respect of aspects of work such as interruptions, repetitive tasks, the need to work to deadlines, the need to switch between tasks, or the need to deal with conflicting or simultaneous demands.

Work related pressures do not just relate to the main tasks of the job requiring concentration, and should not be considered in isolation from the nature of the day-to-day work. These pressures should be considered in relation to the whole job in conjunction with the concentration required. For example, if the job requires focused concentration for prolonged periods, it is unlikely that the main source of work-related pressures would be unavoidable interruptions, as these two aspects would appear contradictory when the job is considered as a whole.

"LIMITED" - for example, the jobholder is able to determine their **own priorities**; OR the jobholder is unaffected by interruptions; OR the jobholder is able to concentrate on the task in hand etc

"CONSIDERABLE" - for example, deadlines primarily determined by the requirements of the workload or the service over which the jobholder has **less** control, for example, preparation timetable relating to service of school meals; OR the jobholder is able to deal with interruptions later; OR the jobholder is required to switch between a number of tasks etc

"HIGH" - for example, imposed deadlines over which the jobholder has **no** control, for example, final mail collection time or preparation of reports for committee cycle; OR the jobholder requires to concentrate on repetitive work; OR interruptions which are unavoidable; OR the jobholder needs to deal immediately with simultaneous or conflicting demands OR the jobholder is required to switch between a range of activities etc

The degree of work related pressure imposed on the jobholder by any one of the possible sources (i.e. interruptions, repetitive work, conflicting demands, deadlines etc) may be increased or decreased according to the intensity of the concentration required and the length of time that it must be sustained.

"TASKS" – are the individual elements within a job or activity, for example, typing and filing are tasks within clerical activity; digging and pruning are tasks within the activity of gardening; ordering and invoicing are tasks within the activity of purchasing; washing and dressing are elements of a caring activity.

"ACTIVITIES" – the range of tasks required to complete a process such as purchasing, cooking etc

"WORKLOAD OR SERVICE DELIVERY RELATED" – i.e. deadlines primarily determined by the requirements of the workload or service over which the jobholder has less control, for example, preparation timetable relating to service of school meals.

"EXTERNAL/ OUTSIDE THE JOBHOLDER'S CONTROL" – i.e. imposed deadlines over which the jobholder has no control, for example, final mail collection or preparation of reports for Committee cycle.

Timespan

The extent of these demands is affected by the period for which the jobholder's attention is typically sustained without interruption:

- "SHORT" - i.e. generally periods of up to 1 hour at a time.
- "LENGTHY" - i.e. generally periods of 1 to 2 hours at a time.
- "PROLONGED" - i.e. generally periods of more than 2 hours at a time.

"INTERRUPTIONS" constitute any occurrence which diverts the jobholder's attention from the immediate task in hand, e.g. answering a telephone call, dealing with a personal caller, completing one task and starting another etc

Breaks required by Health and Safety Regulations (for example, for VDU work or driving), or other recognised breaks, should **not** be treated as breaks in the period of attention.

Demands over particular periods relate to the nature of the work, and **not** to the contractual hours of the jobholder.

N.B. Volume of work - should **not** be taken into account. Otherwise decreasing volumes of work, through additional staff being appointed, could result in down-scoring of jobs; or increasing volumes of work could result in the up-grading of jobs at the cost of desirable work practices.

FACTOR 5 - CONCENTRATION

This factor considers the concentration required to do the job.

It covers the need for mental or sensory attention, awareness and alertness, and anything which may make concentration more difficult, such as repetitive work, interruptions or the need to switch between varied tasks or activities; and other forms of work-related pressure, for example, arising from simultaneous/conflicting work demands or deadlines.

The factor takes into account the nature and degree of the **highest** level of concentration required in the course of **normal working**, and the duration of the requirement.

FACTOR 5 - CONCENTRATION

Level	Definition
1	<p>The highest concentration required by the job, on a day-to-day basis, is either:</p> <p>1 general mental and sensory attention with a limited or considerable degree of work-related pressure</p> <p>or</p> <p>2 short periods of enhanced mental or sensory attention with a limited degree of work-related pressure.</p>
2	<p>The highest concentration required by the job, on a day-to-day basis, is either:</p> <p>1 general mental and sensory attention with a high degree of work-related pressure</p> <p>or</p> <p>2 short periods of enhanced mental or sensory attention and a considerable degree of work-related pressure</p> <p>or</p> <p>3 short periods of focused mental or sensory attention and a limited degree of work-related pressure</p> <p>or</p> <p>4 lengthy periods of enhanced mental or sensory attention and a limited degree of work-related pressure.</p>

FACTOR 5 - CONCENTRATION

Level	Definition
3	<p>The highest concentration required by the job, on a day-to-day basis, is either:</p> <p>1 short periods of enhanced mental or sensory attention and a high degree of work-related pressure</p> <p>or</p> <p>2 lengthy periods of enhanced mental or sensory attention and a considerable degree of work-related pressure</p> <p>or</p> <p>3 prolonged periods of enhanced mental or sensory attention and a limited degree of work-related pressure</p> <p>or</p> <p>4 short periods of focused mental or sensory attention and a considerable degree of work-related pressure</p> <p>or</p> <p>5 lengthy periods of focused mental or sensory attention and a limited degree of work-related pressure.</p>
4	<p>The highest concentration required by the job, on a day-to-day basis, is either:</p> <p>1 lengthy periods of enhanced mental or sensory attention, and a high degree of work-related pressure</p> <p>or</p> <p>2 prolonged periods of enhanced mental or sensory attention, and a considerable degree of work-related pressure</p> <p>or</p> <p>3 short periods of focused mental or sensory attention and a high degree of work-related pressure</p> <p>or</p> <p>4 lengthy periods of focused mental or sensory attention and a considerable degree of work-related pressure</p> <p>or</p> <p>5 prolonged periods of focused mental or sensory attention and a limited degree of work-related pressure.</p>
5	<p>The highest concentration required by the job, on a day-to-day basis, is either:</p> <p>1 prolonged periods of enhanced mental or sensory attention and a high degree of work-related pressure</p> <p>or</p> <p>2 lengthy periods of focused mental or sensory attention and a high degree of work-related pressure</p> <p>or</p> <p>3 prolonged periods of focused mental or sensory attention and a considerable degree of work-related pressure.</p>
6	<p>The highest concentration required by the job, on a day-to-day basis, is prolonged periods of focused mental or sensory attention and a high degree of work-related pressure.</p>

FACTOR 6 - COMMUNICATION SKILLS

Scope of Factor

The factor covers the purpose of the communication required, the complexity of the information involved, and the nature of the intended audience.

The job should be evaluated according to the **most demanding** form of communication required in the course of normal working. This refers to the level of communication **skill** required, **not** to the difficulty the jobholder might experience in undertaking these communications, **nor** to the ability or effectiveness of the individual.

N.B. Where a level definition includes a **range** of criteria for meeting the level of demand, the **majority** of the elements must be regular features of the job to justify scoring at that level. Where the job demonstrates only one aspect of the range of demands at a particular level, it will generally be assessed at a lower level. Particularly when using the paper JE Scheme rather than the COSLA Gauge 'Evaluator' software Job Analysts must ensure that there is evidence of all or the majority of the step changes in demand (i.e. the words in **bold** in the level definitions) in the job before assessing the job in relation to the specific statement identified within the level definition.

The Purpose of the Communication

The emphasis of the factor is on the means, rather than the mechanisms, of written or verbal communications to which the jobholder's skills are put, for example, promoting, obtaining information from others, gaining the co-operation of others, meeting the needs of others. Communications may be face to face, in writing, or via technological media.

"EXCHANGING INFORMATION" i.e. communicating with colleagues in other departments or other contacts, such as clients, customers, suppliers or members of the public, to pass on or receive information. For example, support staff dealing with routine enquiries by telephone, correspondence, e-mail or face to face.

"SEEKING/PROVIDING INFORMATION" i.e. to obtain/give facts or information to help jobholder/other contacts to complete tasks through discussion, enquiries and/or interpretation. For example, staff assisting service users/recipients to access information, or select from a number of available options.

"ELICITING/EXPLAINING INFORMATION" i.e. includes research, interview, investigation or the need to provide explanations of outcomes, policies. For example, in conducting a service review, explaining how policy applies in practice to service users/recipients.

"ADVISING/GUIDING/PERSUADING" i.e. providing specialist/ technical/ professional advice on the best course of action to be taken. For example, professional staff advising internal or external contacts on a best practice approach or the legal/financial/technical implications of a range of potential options under consideration. N.B. this may include the provision of informal/formal counselling in a caring/welfare context rather than in a disciplinary context.

It may be helpful to consider the circumstances in which advice or guidance is being provided; the dictionary definitions of the terminology used in the level definitions in this context are provided below along with alternatives that may help in establishing the degree of demand in relation to the provision of advice or guidance:

- **Advise** – defined as ‘to give advice or counsel’ - alternatives: direct, recommend, give a professional or specialist opinion
- **Guide** – defined as ‘to lead, conduct or direct’ – alternatives: influence, standard, model, steer, show, lead
- **Persuade** – defined as ‘to induce by argument into doing something’ - alternatives: win over, sway, change somebody’s mind, discourage, dissuade
- **Counsel** – defined as ‘to advise, to recommend’ – alternatives: guidance, suggest, warn, help, aid, assist
- **Inform** – defined as ‘to impart knowledge to’ – alternatives: tell, notify, let someone know, update, enlighten
- **Influence** – defined as ‘the power to produce an effect unobtrusively’ - alternatives: power, pressure, manipulate, induce, win over, talk into
- **Encourage** – defined as ‘to inspire with courage or hope’ - alternatives: give confidence, support, promote, further
- **Convince** – defined as ‘to overcome doubts or to satisfy as to truth or error’ - alternatives: induce, talk into, prove to, convert, assure

"TRAINING" i.e. refers to functional, specialist or technical training activity, and includes development of training materials, delivery of training sessions, facilitating training workshops, assessment of training outputs, provision of feedback and/or individual coaching. Formal training includes, for example, IT or customer service courses or delivery of Health and Safety update training by specialist/designated training officers for Council employees; and may be accredited; Informal training includes, for example, policy officers providing briefings to colleagues in other departments on revised regulations.

"PRESENTING" refers to formal preparation and delivery of information, which requires inherent understanding of the material by the presenter to ensure the correct message is delivered. Both the content and format of the information will need to be tailored to the intended audience.

"PUBLIC RELATIONS/PROMOTING" i.e. in a formal rather than an informal role refers to the preparation and/or delivery of specific activities/events/materials intended to convey the Council's message in particular circumstances. For example, to promote and safeguard the Council's interests and public image, including 'damage limitation' exercises, and the requirement to convey this to external agents such as the media.

"USING ANOTHER LANGUAGE" i.e. including Braille, sign language, Makaton, Gaelic, or a relevant ethnic minority language. This refers to the demand for communication in one or more languages, generally other than English, where this is required for performance of the job duties.

N.B. Counselling is considered in a caring/welfare context rather than in a disciplinary context:

"SUPPORTIVE/INFORMAL COUNSELLING" of employees (other than immediate colleagues or sub-ordinates)/service users/clients/others includes dealing with issues of drugs, alcohol, welfare etc. For example, persuading them to agree to a course of action in their best interests but which they may reject.

"FORMAL/IN-DEPTH COUNSELLING" of employees (other than immediate colleagues or sub-ordinates)/service users/clients/others includes holding meetings with them in order to help them come to terms with or resolve personal problems. Examples would be trauma or harassment counselling. This role **MUST** be a clearly specified part of the job duties and occur on a regular basis.

Advocacy skills relate to pleading skills used in situations such as Courts, Formal Appeals or Inquiries:

"INFORMAL ADVOCACY" for example, dealing with an external agency on a CLIENT'S behalf such as Benefits Agency or Children's Panel hearings; or representing the Council's position at an INTERNAL hearing such as a disciplinary appeal, or giving factual evidence on the Council's behalf in an EXTERNAL hearing such as an Employment Tribunal.

"FORMAL ADVOCACY" for example, representing the COUNCIL'S position in a formal external environment, such as Inquiries or legal proceedings. This will typically involve preparation of the Council's case, researching precedents, giving expert opinion, preparing summations etc. This role MUST be an integral or specified part of the job, although the individual jobholder may not undertake these duties on a regular basis, they may be expected to undertake them at any time.

The Nature of the Information Communicated

The factor covers the complexity or contentiousness of the subject matter to be conveyed, and any requirements to exercise confidentiality or sensitivity.

"ROUTINE" i.e. information related to tasks and activities as part of the normal course of working, although the individual circumstances may vary on a day to day basis.

"NON-ROUTINE" i.e. information relating to unusual tasks or activities not typically required.

"COMPLICATED" i.e. information made up of a number of separate parts, where it is essential for the recipient to understand every part in order to gain a sufficiently clear picture or to accept what is being said.

"SENSITIVE" i.e. information which could reasonably be regarded as personal, private or confidential, which could cause embarrassment if disclosed unnecessarily.

"CONTENTIOUS" i.e. information likely to cause public outcry or lead to confrontational circumstances or disputes.

"COMPLEX" i.e. information which has more than one aspect and may not be readily understood without additional knowledge.

"WIDE RANGING" i.e. information where implications may extend throughout or beyond the Council and its boundaries.

The Nature of the Intended Audience

The level of communication skills takes into account the nature of the intended audiences or recipients of information and their familiarity with the subject matter. Certain individuals or groups may require more developed skills because of their circumstances, positions, attitudes or ability to understand the information being conveyed. Communications with immediate work colleagues are **excluded**.

"IMMEDIATE WORK COLLEAGUES" - i.e. the jobholder's subordinates, peers and superiors within the defined work unit or section, NOT their counterparts or equivalents in other sections or departments

"CLIENTS/SERVICE USERS or RECIPIENTS" - in this context, are people who are dependent upon the services of the local authority, for the provision of a service, either directly or through a contractor/partner. Clients **exclude internal** authority customers such as client departments, who should be considered as customers.

“FAMILIAR” – the intended recipient/audience has a clear understanding of the information being communicated – immediate colleagues are excluded but this could include others within the Council or within external partnership organisations when they are involved in dealing with the same issues.

“UNFAMILIAR” – the intended recipient/audience will be unfamiliar with the subject matter – this could be others within the Council (who are not immediate colleagues), or more likely external contacts (when they are not involved in dealing with the same issues).

“RANGE OF AUDIENCES” – the intended recipients of the communication (in any format/media) are from a range of differing backgrounds and will have varied levels of knowledge and understanding of the subject matter – recipients could therefore be internal/external and/or stakeholders/public etc; and need not be physically present to be addressed by the jobholder

NOTE 1: Providing instruction, professional development guidance, or on-the-job training to EMPLOYEES or equivalent others is taken into account under the ‘Responsibility for Employees’ factor heading.

NOTE 2: Care should be taken to ensure demands under this factor are not double counted in relation to demands under the ‘Responsibility for Services to Others’ factor heading.

NOTE 3: Care should be taken to ensure demands under this factor are not double counted in relation to demands under the ‘Dealing with Relationships’ factor heading.

FACTOR 6 - COMMUNICATION SKILLS

This factor considers the most demanding requirement for spoken and written communication in the course of normal working.

It covers the nature of oral, sign, linguistic and written communication skills such as informing, exchanging information, listening, interviewing, advising, persuading, counselling, training, presenting, facilitating, conciliating, negotiating, and advocacy.

The factor takes into account the purpose of the communication, the sensitivity, complexity or contentiousness of the subject matter, and the nature and diversity of the intended audience.

FACTOR 6 - COMMUNICATION SKILLS

Level	Definition
1	<p>The most demanding type of communication routinely involved in the job is either:</p> <p>1 communication with immediate work colleagues only</p> <p>or</p> <p>2 exchanging information of a routine nature, usually orally, with colleagues in other departments and/or other contacts such as suppliers, clients/service users or recipients, or members of the public.</p> <p>or</p> <p>3 seeking and/or providing information, orally or in writing, with colleagues in other departments or other contacts including members of the public, who are familiar with the subject matter</p>
2	<p>The most demanding type of communication routinely involved in the job is either:</p> <p>1 exchanging information of a non-routine nature with contacts who are familiar with the subject matter</p> <p>or</p> <p>2 seeking and/or providing information, orally or in writing, with contacts who are unfamiliar with the subject matter</p> <p>or</p> <p>3 eliciting and/or explaining information, orally or in writing, with contacts likely to be familiar with the subject matter</p>

FACTOR 6 - COMMUNICATION SKILLS

Level	Definition
3	<p>The most demanding type of communication routinely involved in the job is either:</p> <p>1 eliciting and/or explaining information, orally or in writing, with contacts likely to be unfamiliar with the subject matter, or to a range of audiences</p> <p>or</p> <p>2 exercising communication skills in advising, guiding, persuading in order to inform others who are familiar with the subject matter</p> <p>or</p> <p>3 delivering informal training or presentations to colleagues or others who are familiar with the subject matter</p> <p>or</p> <p>4 using another language to exchange greetings and straightforward information.</p> <p>or</p> <p>5 exercising communication skills in advising, guiding, persuading in order to inform others, who are likely to be unfamiliar with the subject matter of straightforward information.</p> <p>or</p> <p>6. exercising communication skills to counsel colleagues referred for professional advice</p>
4	<p>The most demanding type of communication routinely involved in the job is either:</p> <p>1 eliciting and/or explaining complicated or sensitive information, including interviewing and/or substantiating a case, with a range of audiences including non-specialists</p> <p>or</p> <p>2 exercising developed communication skills in advising, guiding, persuading, negotiating or influencing in order to encourage others to adopt a particular course of action</p> <p>or</p> <p>3 delivering formal training or presentations to a range of audiences</p> <p>or</p> <p>4 using other languages to exchange complicated information and provide explanations to others.</p> <p>or</p> <p>5 exercising developed communication skills in advising, guiding, persuading in order to inform others, who are likely to be unfamiliar with the subject matter of sensitive or complicated information.</p> <p>or</p> <p>6. exercising communication skills to counsel clients/others referred for professional advice OR to provide supportive/informal counselling for colleagues</p>

FACTOR 6 - COMMUNICATION SKILLS

Level	Definition
5	<p>The most demanding type of communication routinely involved in the job is either:</p> <p>1 eliciting and/or explaining complex and contentious information with a range of audiences, including non-specialists</p> <p>or</p> <p>2 exercising highly developed communications skills in advising, guiding, persuading, negotiating, influencing or informal advocacy, in order to convince others to adopt courses of action they might not otherwise wish to take.</p> <p>or</p> <p>3 exercising communication skills to provide supportive/informal counselling for clients/others OR to provide formal/in-depth counselling for colleagues</p>
6	<p>The most demanding type of communication routinely involved in the job is either:</p> <p>1 eliciting and/or explaining wide ranging complex and contentious information with a range of audiences, including non-specialists and liaison with the media in a public relations or corporate context</p> <p>or</p> <p>2 exercising very highly developed communication skills in advising, guiding, persuading, negotiating, influencing or formal advocacy, in order to convince others to adopt policies and courses of action they might not otherwise wish to take</p> <p>or</p> <p>3. exercising communication skills to provide formal/in-depth counselling for clients/others</p>

FACTOR 7 - DEALING WITH RELATIONSHIPS

Scope of Factor

This factor covers demands arising from people-related features of the job (in contrast to the Concentration factor which covers demands arising from work-related features). It considers the demands on the jobholder as a result of coming into contact with, having to deal or work with, people who are upset, unwell, difficult, angry, have special needs, are at risk, are disadvantaged, or are otherwise demanding in some way.

Demands arising from the need to work with **immediate colleagues are excluded**, because changes in personnel could otherwise result in changes to the evaluation.

It is assumed that all relevant precautions are taken, that the jobholder is trained to deal with the relevant people and complies with appropriate Health and Safety procedures.

The Nature of Demand

The **'people'** who impose demands may include the public, clients, customers, users of services provided by the jobholder, elected members, other employees of the local authority or other organisations (internal and external). Those who the jobholder comes into contact with may be abusive, threatening, disadvantaged or otherwise demanding, i.e. in terms of either their physical condition or mental state.

"INCIDENTAL" contact is generally occasional, i.e. less than 20% of working time, and does **not** require a specific response or action on the part of the jobholder as it is **outwith their remit**. The jobholder will generally not be required to take action on another's behalf beyond passing on information, referring enquiries to the appropriate person etc. For example, Refuse Collectors subjected to verbal abuse by members of the public regarding the level of Council Tax may pass on the Council phone number; a School Cook taking a sick or distressed child to the School Nurse.

"INTEGRAL" contact requires a direct response from, or action by, the jobholder in order to deal with people in the course of doing their job. The jobholder will be required to progress issues or formulate a response to matters arising as part of the normal routine of the job. For example, a School Nurse attending to a sick or distressed child; a Care Assistant travelling with clients to and from a day care centre - whereas the driver of the mini-bus would have 'incidental' contact with the same clients.

"DEALING DIRECTLY WITH" is not restricted to face-to-face contact. It includes making any arrangements which involve dealing directly with the demanding person(s).

"MORE THAN NORMAL COURTESY" is required to deal with incidental enquiries/requests from people whose circumstances have made them distressed, confused etc.

The Degree of Demand

Account is taken of the nature of the behaviour or circumstances of the people encountered in the course of normal working which places additional demands on the jobholder in terms of service delivery, and the **extent** to which these people are demanding:

"SLIGHTLY" for example, those who are non-disabled but who are otherwise demanding, OR mainstream children over 5, OR those who subject the jobholder to casual abuse, such as swearing.

"SIGNIFICANTLY" for example, those who are unwell OR confused OR pre-five children OR those who subject the jobholder to specific verbal abuse.

"SUBSTANTIALLY" for example, those who are ill OR are in some distress OR have learning difficulties OR are at risk OR are in conflict with the authority which the jobholder requires to resolve.

"SEVERELY" for example, those who are long term sick OR are acutely distressed OR have special physical/educational/social needs OR are victims of abuse OR who subject the jobholder to aggression OR from whom there is a potential risk of violence.

"EXTREMELY" for example, those who are in need of palliative or end of life care OR are profoundly physically and/or mentally less able OR are traumatised OR from whom the jobholder is at a constant risk of violence.

N.B. It should not be assumed that the same degree of demand applies to all staff dealing with a particular contact as staff at various levels in the organisational hierarchy may be dealing with the same contact for different purposes.

Frequency and Duration of Demand

Account of also taken of the proportion of working time which the jobholder comes into contact with demanding people.

Consideration should be given to the **normal** cycle of work of the job to identify an appropriate period of time from which to determine the "percentage" during which the jobholder requires to deal with those who are abusive, threatening, disadvantaged or otherwise demanding, for example, part of: a shift, a day, a week, a month, quarterly, annually etc.

NOTE: Care should be taken to ensure demands under this factor are not double counted in relation to demands under the 'Communications Skills' factor heading.

FACTOR 7 - DEALING WITH RELATIONSHIPS

This factor considers the additional demands on the jobholder in terms of service delivery arising from the circumstances and/or behaviour of those he/she comes into contact with as an integral part of normal working.

It covers the interpersonal skills needed to deal with and/or care for other people (excluding the job holder's immediate work colleagues) who are upset, unwell, difficult, angry, frail, confused, have special needs, are at risk of abuse, are in need of palliative or end of life care, or are disadvantaged in some way. It also considers the need to cope with abuse, aggression, the threat of violence, and/or to deal with conflict.

The factor takes account of the extent of dealing with such contacts in the course of normal working, and the frequency and duration of the contact.

FACTOR 7 - DEALING WITH RELATIONSHIPS

Level	Definition
1	<p>There are additional demands on the jobholder in terms of service delivery resulting from the circumstances or behaviour of people with whom he/she has incidental contact.</p> <p>OR</p> <p>The job involves a requirement to work with, deal with, or come into contact as an integral part of the job with people who make slight additional demands on the jobholder in terms of being abusive, threatening, disadvantaged, or otherwise demanding for up to 20% of working time</p>
2	<p>There are additional demands on the jobholder in terms of service delivery resulting from incidental contact with people whose circumstances or behaviour require that they are treated with more than normal courtesy.</p> <p>OR</p> <p>The job involves a requirement to work with, deal with, or come into contact as an integral part of the job with:</p> <p>1 people who make slight additional demands on the jobholder in terms of being abusive, threatening, disadvantaged, or otherwise demanding for more than 20% of working time</p> <p>or</p> <p>2 people who make significant additional demands on the jobholder in terms of being abusive, threatening, disadvantaged, or otherwise demanding for up to 20% of working time.</p>

FACTOR 7 - DEALING WITH RELATIONSHIPS

Level	Definition
3	<p>The job involves a requirement to work with, deal with, or come into contact as an integral part of the job with:</p> <p>1 people who make significant additional demands on the jobholder in terms of being abusive, threatening, disadvantaged, or otherwise demanding for more than 20% of working time</p> <p>or</p> <p>2 people who make substantial additional demands on the jobholder in terms of being abusive, threatening, disadvantaged, or otherwise demanding for up to 20% of working time</p>
4	<p>The job involves a requirement to work with, deal with, or come into contact as an integral part of the job with:</p> <p>1 people who make substantial additional demands on the jobholder in terms of being abusive, threatening, disadvantaged, or otherwise demanding for more than 20% of working time</p> <p>or</p> <p>2 people who make severe additional demands on the jobholder in terms of being abusive, threatening, disadvantaged, or otherwise demanding for up to 20% of working time</p>
5	<p>The job involves a requirement to work with, deal with, or come into contact as an integral part of the job with:</p> <p>1 people who make severe demands on the jobholder in terms of being abusive, threatening, disadvantaged, or otherwise demanding for more than 20% of working time</p> <p>or</p> <p>2 people who make extreme demands on the jobholder in terms of being abusive, threatening, disadvantaged, or otherwise demanding for up to 20% of working time</p>
6	<p>The job involves a requirement to work with, deal with, or come into contact as an integral part of the job with people who make extreme demands on the jobholder in terms of being abusive, threatening, disadvantaged, or otherwise demanding for more than 20% of working time</p>

FACTOR 8 - RESPONSIBILITY FOR EMPLOYEES

Scope of Factor

Consideration is given to the predominant **nature** of the jobholder's responsibility for employees rather than to the number of employees supervised. The level definitions reflect this and the **scope and degree** of responsibility exercised. Consideration is also given to the **frequency** with which this demand is required. Job Analysts should take care to set the jobholder's responsibility in context and ensure they understand its place in the organisational hierarchy; and can therefore assess the job's responsibilities in relation to those of the immediate line manager, senior management, Head of Service etc but also in relation to the responsibilities of colleagues and subordinates.

Others in an Equivalent Situation - account should be taken of all employees or others whose supervision, management, or co-ordination is the **direct** responsibility of the jobholder, including:

- contractors' or suppliers' employees;
- volunteers and the employees / workers of voluntary organisations;
- work experience students or trainees;
- students on placement for practical experience;
- others in a similar situation.

Where a level definition includes a **range** of criteria for meeting the level of demand, the **majority** of the elements must be regular features of the job to justify scoring at that level. Where the job demonstrates only one aspect of the range of demands at a particular level, it will generally be assessed at a lower level.

N.B. The Gauge 'Evaluator' software does this automatically, but when using the paper based JE Scheme Job Analysts need to be aware that both paragraphs within the definitions of Levels where they are separated by the word '**and**' need to be satisfied for a job to be assessed at that level; and that combinations of demands from different levels should be assessed at the lower level.

Nature of Responsibility

Consideration is given to the **nature** of the jobholder's responsibility for employees or others:

"ALLOCATING" refers to responsibility for the determination of appropriately skilled and experienced members of a work team/unit to undertake broad elements of an overall work plan to ensure overall achievement of an on-going programme of work, rather than the day to day distribution of specific tasks to individual members of a team/unit or others.

"PERFORMANCE APPRAISAL" refers to both informal and formal assessment of subordinate's work against expected standards.

"DIRECTING" means managing rather than first line supervision.

"MONITOR" performance of work undertaken in respect of a predetermined programme.

"PRIORITISE" includes evaluating/auditing activities and re-prioritising work undertaken as a result, within previously established parameters.

"REVIEW" includes examining and assessing activities and methods to establish their continued appropriateness to objectives.

"DETERMINE" includes establishing priorities and objectives, setting targets, and resource requirements.

Degree of Responsibility

Consideration is given to the **extent** to which the jobholder is responsible for employees:

"INVOLVED IN" i.e. carry out (and be subject to decisions) in relation to the application and implementation of personnel practices, e.g. undertake first line absence/performance monitoring and disciplinary/grievance investigations including formal interviews, participate in selection process by attending recruitment interviews etc.

"DIRECTLY" i.e. implementing/carrying out personnel practice and procedures.

"RESPONSIBLE FOR" i.e. taking appropriate decisions to implement personnel practice and procedure, e.g. operational line manager convening and chairing a hearing/panel and determining an appropriate outcome.

"ENSURE" i.e. making sure that implementation of service/functional/departmental policy, procedure and practice is properly applied in line with Council policy.

"MANAGE" i.e. the jobholder is responsible for the operational application / interpretation of the personnel framework, and monitors the implementation of service/functional/departmental procedure/practice in line with that policy.

"ACCOUNTABLE" i.e. the jobholder is responsible for determining how the Council's personnel framework is to be applied in the service/department/function concerned.

Scope

Consideration is given to the **scope** of the jobholder's responsibility for employees and others in terms of activities, services, functions, departments, and/or corporately:

The definitions of 'service', 'function' and 'department' will need to be considered in the context of the organisational hierarchy and the descriptors used at its various levels, for example, a range of activities might be delivered within a single service, a number of services might make up the function, and that function might be one of a number within a department.

"ACTIVITY" in this context generally equates to the work of a single team or section delivering one of a range of activities within a service

"SERVICE" in this context generally equates to a number of teams or sections delivering a range of related activities, for example, treasury management and budget preparation might be activities within the accounting service

"FUNCTION" in this context generally equates to a number of services relating to a professional discipline for example, accounting and audit might be services within the finance function

"DEPARTMENT" in this context generally equates to a range of functions managed together at a strategic level within the organisation, for example, both Finance and the Legal, Regulatory & Governance Division might be among a number of functions within the Corporate Support Department

“CORPORATE” in this context generally equates to, for example, multi-functional, multi-departmental or Council wide initiatives.

Frequency

Account is taken of the responsibility carried by those who do not supervise employees or others on a full-time or permanent basis.

"OCCASIONAL" i.e. required to supervise in exceptional circumstances unlikely to occur more than half a dozen times a year.

"REGULAR" i.e. shift supervisor or supervisor of seasonal or temporary employees.

Performance Appraisal

Within this factor reference is made to work carried out under a performance appraisal system. This applies to either formal or informal appraisal of the work or performance of employees or others against expected standards, by the jobholder in the role of supervisor or line manager. However, this does not include appraisal of the performance of consultants in a project management role.

FACTOR 8 - RESPONSIBILITY FOR EMPLOYEES

This factor considers the predominant responsibility of the jobholder for the supervision, co-ordination or management of employees, or equivalent others.

It includes responsibilities for work allocation and planning, checking, evaluating and supervising the work of others; providing guidance, training and development of own team/employees, motivation and leadership; and involvement in personnel practices such as recruitment, appraisal and discipline.

The factor takes account of the nature of the responsibility, rather than the precise numbers of employees supervised, co-ordinated or managed; and the extent to which the jobholder contributes to the overall responsibility for employees.

FACTOR 8 - RESPONSIBILITY FOR EMPLOYEES

Level	Definition
1	<p>The job predominantly involves limited responsibility for the supervision of others, such as:</p> <p>1 demonstration of duties, or provision of advice and guidance, to new employees, trainees, students or others</p> <p>or</p> <p>2 co-ordination of work or on-the-job training of employees or others on an occasional basis</p>
2	<p>The job predominantly involves responsibility for:</p> <p>1 instructing, guiding, allocating and checking the work of others assisting the jobholder and providing advice and guidance on regular but not daily basis.</p> <p>or</p> <p>2 co-ordination, supervision and/or on-the-job training of employees or others across one area of activity on a regular, but not daily basis. This may include co-ordination of their training and/or (formal or informal) performance appraisal.</p> <p>OR</p> <p>3 The job involves predominantly day to day responsibility for the supervision, co-ordination and/or training of a team of employees or others across more than one area of activity. This includes instructing, allocating and checking work, advising and guiding, and/or providing on-the-job training or co-ordinating training and/or (formal or informal) performance appraisal; BUT the jobholder will NOT be involved in the implementation of the Authority's personnel practice and procedure.</p>

FACTOR 8 - RESPONSIBILITY FOR EMPLOYEES

Level	Definition
3	<p>1. The job involves predominantly day to day responsibility for the supervision, co-ordination and/or training of a team of employees or others across one area of activity. This includes instructing, allocating and checking work, advising and guiding, and/or providing on-the-job training or co-ordinating training and/or (formal or informal) performance appraisal.</p> <p>And</p> <p>The jobholder will also be involved in the implementation of the Authority's personnel practice and procedure</p> <p>OR</p> <p>2. The job predominantly involves responsibility for the management, direction, co-ordination, training and development of employees or others. This includes monitoring the performance of the group or team; evaluation of the work carried out and prioritising areas of work across one area of activity.</p> <p>And</p> <p>The jobholder will also be involved in the implementation of the Authority's personnel practice and procedure across one activity.</p>
4	<p>1. The job predominantly involves responsibility for the management, direction, co-ordination, training and development of employees or others. This includes monitoring the performance of the group or team; evaluation of the work carried out against a pre-determined programme; and prioritising areas of work.</p> <p>And</p> <p>The jobholder will also be involved in the implementation of the Authority's personnel practice and procedure across more than one activity.</p> <p>OR</p> <p>2. The job predominantly involves responsibility for the management, direction, co-ordination and development of employees or others. This includes re-prioritising activities within established parameters and the evaluation of activities and working methods</p> <p>And</p> <p>The jobholder will also be directly responsible for the implementation of the Authority's personnel practice and procedure across more than one area of activity</p>

FACTOR 8 - RESPONSIBILITY FOR EMPLOYEES

Level	Definition
5	<p>1. The job predominantly involves responsibility for the management, direction, co-ordination and development of employees or others. This includes re-prioritising activities within established parameters and the evaluation of activities and working methods.</p> <p>And The jobholder will also be responsible for ensuring the implementation of the Authority's personnel practice and procedure at a service level</p> <p>OR</p> <p>2. The job predominantly involves responsibility for the management, direction, co-ordination, development and effective deployment of employees or others. This includes determining priorities and targets and reviewing activities and working methods.</p> <p>And The jobholder will also be responsible for ensuring the implementation of the Authority's personnel policy, procedure and practice at a service level.</p>
6	<p>The job predominantly involves responsibility for the management, direction, co-ordination, development and effective deployment of employees or others. This includes determining priorities and targets and reviewing activities and working methods.</p> <p>And</p> <p>The jobholder will also be responsible for managing and monitoring the implementation of the Authority's personnel framework at a service, departmental or functional level.</p>
7	<p>The job predominantly involves overall responsibility for the efficient and effective deployment of employees and other human resources at a multi-departmental/ multi-functional / corporate level. This includes determining resource requirements, and setting departmental/functional/organisational objectives.</p> <p>And/Or</p> <p>The jobholder will be accountable for the implementation of the Authority's personnel framework.</p>

FACTOR 9 - RESPONSIBILITY FOR SERVICES TO OTHERS

Scope of the Factor

This factor considers the nature and degree of responsibility which the jobholder has for individuals, or groups of people (members of the public, internal/external service users and recipients, clients, customers), other than employees supervised or managed by the jobholder. Job Analysts should take care to set the jobholder's responsibility in context and ensure they understand its place in the organisational hierarchy; and can therefore assess the job's responsibilities in relation to those of the immediate line manager, senior management, Head of Service etc but also in relation to the responsibilities of colleagues and subordinates.

People - in this context are the recipients of services provided by the local authority, or the **direct** beneficiaries of its activities. Those who are "beneficiaries" or recipients will not necessarily be happy with the relevant activities, for example, abused children removed from their families, restaurant owners being inspected for compliance with hygiene regulations. This relates to ALL services provided by the Council whether statutory or non-statutory, internal and external.

Equivalent Client or Customer Relationship - this factor generally measures responsibilities which have a direct impact on people **other than** Council employees. However, some jobs with responsibilities for other groups of people such as contractors, suppliers, volunteers, students etc, who are not service recipients nor employees supervised by the jobholder, should also be assessed.

Those in an equivalent client or customer relationship include other employees of the local authority, for example, customers of internal staff catering facilities, or clients of personnel, training, equalities or welfare officers; or the employees or volunteers of a voluntary organisation, to whom the jobholder is providing a direct service - but supervisory or co-ordinating responsibilities should be measured under the 'Responsibility for Employees' factor heading.

Health and Safety

Account should be taken under this factor of specific job responsibilities for the health and safety of other employees, for example, those of a Safety Officer.

The responsibilities of Health and Safety representatives are **not** normally part of the duties of the job: they generally attach to the individual and should **not** be assessed.

Nature of the Demand

Account is taken of the **nature** of the jobholder's responsibility for the quality and delivery of services to others:

"SUPPORT" i.e. provision of services to mainly internal contacts, for example, filing, word processing, secretarial support, vehicle or plant maintenance, internal mail, or IT help desk logging calls.

"FRONT LINE" i.e. provision of services to mainly external contacts, for example, nursery/home care, catering, cleaning, rent or Council tax collection, housing repairs, parks and recreation, refuse collection, etc. In this context "DELIVER" refers to the personal delivery of the service to individual clients/customers/service users or recipients/members of the public etc.

"APPLYING REGULATIONS OR POLICY" for example, environmental health, building control, licensing, trading standards, health and safety. This includes the provision of specialist/professional advice upon the application of regulations or policy.

"ASSESSING NEEDS OR SERVICE REQUIREMENTS" in relation to the Council's provision of a service, for example, housing, education, finance, grounds/roads maintenance, refuse collection, IT, planning, engineering service requirements; and the development of individual client care plans etc

"MANAGE" in relation to responsibility for organising operational activities undertaken by others

"COMPLIANCE" e.g. with standards/specifications/quality systems in relation to the application of procedures/systems/regulations in undertaking tasks/processes/programmes/activities, the examination/monitoring of the practical implementation of procedures/systems/regulations, or the management/improvement/development of procedures/systems/regulations

Scope

Account is also taken of the **extent** of the jobholder's responsibility for the quality and delivery of services to others:

"PROCESSES" - refers to the completion of tasks required to deliver a service.

"PROGRAMMES" - refers to a plan of services necessary to meet client/service user or recipient needs or fulfil customer requirements.

The definitions of 'service', 'function' and 'department' will need to be considered in the context of the organisational hierarchy and the descriptors used at its various levels, for example, a range of activities might be delivered within a single service, a number of services might make up the function, and that function might be one of a number within a department.

"ACTIVITY" in this context generally equates to the work of a single team or section delivering one of a range of activities within a service

"SERVICE" in this context generally equates to a number of teams or sections delivering a range of related activities, for example, treasury management and budget preparation might be activities within the accounting service

"FUNCTION" in this context generally equates to a number of services relating to a professional discipline for example, accounting and audit might be services within the finance function

"DEPARTMENT" in this context generally equates to a range of functions managed together at a strategic level within the organisation, for example, both Finance and the Legal, Regulatory & Governance Division might be among a number of functions within the Corporate Support Department

"CORPORATE" in this context generally equates to, for example, multi-functional, multi-departmental or Council wide initiatives.

Implementation and Enforcement of Regulations

This refers to **Statutory** Regulations for which local authorities are the implementation or enforcement agents. For example, planning and building control, enforcement of trading standards and environmental health regulations.

"ENSURE / MONITOR" i.e. that others correctly apply/implement the regulations/policy.

"ENFORCE" i.e. to instigate/authorise formal enforcement action such as trading standards, environmental health, planning/building control, child protection, etc.

"ENFORCEMENT ACTION" includes legislation, statutory regulations and Council by-laws for which the Council is the implementation or enforcement agency - e.g. planning and building control, licensing, trading standards and environmental health regulations.

Compliance

This refers to specified responsibilities in relation to the quality of service delivered/provided such as procedures governing best practice, detailed measures/margins in terms of required standards, specification of standards, timing, methods, resources that are the minimum acceptable in-service provision or are required to be met as a guarantee of quality.

"CONTRACTED" may refer to external and/or in-house provision of complex service requirements, for example, Information Management

"ENSURE" i.e. to endorse or formally certify that required standards/specifications/quality systems have been complied with

"MANAGE" i.e. responsible for operational application/interpretation of compliance procedures/systems/regulations, and/or the improvement/development of compliance procedures/systems/regulations

Assessment

This refers to the automatic or mechanical process of delivering or processing the needs of people or the requirements of service users/recipients, for example, taking details of income and circumstances is not sufficient for a job to be scored at Level 3 or above, unless the deliverer or processor also makes the initial assessment of needs/requirements. At Level 3 the assessment could be informal such as those that staff delivering front line services make in the course of their normal routine, for example, whether or how to carry out a prescribed programme of care in light of the condition of the client on a particular day.

At **Level 4** and above, assessment of needs or service requirements is normally **formal** and undertaken through a prescribed assessment process by staff whose duties include responsibility for making such assessments rather than only for front line service delivery.

"BASIC" - service requirements i.e. provision of routine/information to facilitate service delivery, e.g. IT support helpdesk undertaking diagnostics.

"COMPLEX" - service requirements i.e. review of resource requirements, working methods and associated processes, e.g. to establish a new area of service or improve service delivery/provision, Analyst/Programmer designing and testing a new IT system to meet a client department's specified requirements.

Examples of such needs in the **caring** field are:

“BASIC” - needs for food, cleanliness, comfort, conversation, interaction and minor modifications to accommodation.

“COMPLEX” - needs for specialist accommodation, protection from others, stimulation for those with substantial impairment, e.g. as part of the development of an individual care plan

FACTOR 9 - RESPONSIBILITY FOR SERVICES TO OTHERS

This factor considers the jobholder’s predominant responsibility to others in terms of the quality and delivery of service provision.

It covers responsibilities for the provision of physical, mental, social, economic, business and environmental services, including health and safety. This includes services to individuals or groups such as internal or external clients, service users and recipients, customers, contractors, and members of the public.

The factor takes account of the nature of the responsibility and the extent of the jobholder’s impact on individuals or groups. For example, providing personal services, advice and guidance, or other forms of assistance; applying, implementing or enforcing regulations; or designing, developing, implementing and/or improving services or processes.

FACTOR 9 - RESPONSIBILITY FOR SERVICES TO OTHERS

Level	Definition
1	The job predominantly involves undertaking tasks or processes to provide support directly to colleagues or internal/external customers.
2	The job predominantly involves either: <ul style="list-style-type: none"> 1 delivering front-line services to individuals, groups of people, or internal/external customers by undertaking tasks or processes, <li style="text-align: center;">or 2 applying regulations or Council policy.
3	The job predominantly involves responsibility for services to individuals, or groups of people, through either: <ul style="list-style-type: none"> 1 an assessment of their basic needs or service requirements and implementation of appropriate processes for service provision/delivery <li style="text-align: center;">or 2 ensuring implementation and/or monitoring of regulations or Council policy.
4	The job predominantly involves responsibility for services to individuals or groups of people, through either: <ul style="list-style-type: none"> 1 an assessment of their basic needs or service requirements and implementation of programmes of service activities or processes

FACTOR 9 - RESPONSIBILITY FOR SERVICES TO OTHERS

Level	Definition
	<p>or</p> <p>2 enforcing regulations or Council policy</p> <p>or</p> <p>3 ensuring compliance to standards/specifications in the assessment, quality and delivery of contracted services</p> <p>or</p> <p>4 contributing to the assessment of complex needs or service requirements and monitoring the quality and delivery of service.</p>
5	<p>The job predominantly involves responsibility for services to individuals or groups of people through:</p> <p>1 assessment of complex needs or service requirements and managing the quality and provision/delivery of programmes of activities or services</p> <p>or</p> <p>2 managing compliance to standards/specifications in the assessment, quality and delivery of contracted services</p> <p>or</p> <p>3 contributing to the assessment of the service user needs, and to the design, development and improvement of programmes of activities or services.</p>
6	<p>The job predominantly involves responsibility for services through either:</p> <p>1 leading the assessment of complex service user needs, and the design, development and improvement of programmes of activities or services</p> <p>or</p> <p>2 being accountable to Head of Service/Director/Committee for the long-term nature, quality and level of a single service, and for determining the future provision of service.</p>
7	<p>The job predominantly involves accountability to Director/Committee or to the Council for fulfilling its statutory obligations regarding the outcomes required of, and achieved by, a range of services or an entire function.</p>
8	<p>The job predominantly involves accountability to Committee or the Council for fulfilling its statutory obligations regarding the outcomes required of, and achieved by, two or more functions.</p>

FACTOR 10 - RESPONSIBILITY FOR FINANCIAL RESOURCES

Scope of Factor

This factor considers the range of both direct and indirect responsibilities for financial resources, from handling cash and cheques, through processing invoices and other financial transactions, to accounting for financial resources and budgetary activities. Job Analysts should take care to set the jobholder's responsibility in context and ensure they understand its place in the organisational hierarchy; and can therefore assess the job's responsibilities in relation to those of the immediate line manager, senior management, Head of Service etc but also in relation to the responsibilities of colleagues and subordinates.

"DIRECT" refers to the actual physical handling and/or security of "monies" or actual undertaking of financial transactions, for example, reconciling cash takings, posting journal/ledger entries.

"INDIRECT" refers to checking or certifying transactions/activities undertaken by others, for example, checking balances are correct, approving invoices/expenses for payment.

Both the nature of the responsibility and the degree or extent of responsibility are taken into account.

Application of the Level Definitions

Factor level definitions include a **range** of criteria for meeting the level of demand, the **majority** of the elements must be regular features of the job to justify scoring at that level. Where the job demonstrates only one or two aspects of the range of demands described at a particular level, it will generally be assessed at a lower level. However, when using the paper based JE Scheme it is possible, in exceptional cases, to assess the demands of the job at the higher level where one element of the criteria of a level demand is a very significant feature of the job.

Nature of Responsibility

The full range of different types of responsibility for financial resources are considered:

"HANDLING" i.e. receipt or issuing, counting or checking, recording and reconciliation of amounts, preparation of bank deposits, cash floats, petty cash etc. This includes handling vouchers, stamps, phone and fuel cards, tokens, postal orders, credit and debit cards, giro and bankers drafts etc. NOTE: This does NOT include personal responsibility for employee lottery/Christmas/tea funds etc or the use of parking/taxi vouchers/swipe cards etc.

"PROCESSING" i.e. data checking including approval for payment, data input and resolution of queries/anomalies. Financial documentation might include any of the following: invoices, goods received/delivery notes, claims forms, requisitions, timesheets, payroll information, job lines, cost centre data etc.

"TRANSACTIONS" i.e. BACS transfers, payments, receipts, refunds, ledger and journal entries etc.

"SECURITY" refers to the safe storage and/or transport of cash or equivalent, for example, to make bank deposits or collection from remote cash/vending/toll machines/meters etc.

“BUDGETARY” covers all aspects of budgetary activity including compiling, estimating, monitoring, income generation, expenditure, assessment of risk/investments etc – for all types of budgets – income, expenditure, projects etc.

"ACCOUNTING FOR" i.e. to give a reckoning of, to explain, to monitor, to audit, to authorise payment of expenses or refunds, to authorise payment of committed expenditure etc. This does **not** include the ability to commit/vire expenditure.

"MANAGING" means being responsible for organising those activities undertaken by others.

NOTE: The level of managing the audit/accounting process relates to the jobholder's functional/operational responsibility rather than the scope of their work, while the jobholder may work across a number of departments/services their responsibility relates to their own specialism/discipline.

Degree of Demand

The **degree** or extent of responsibility for the various types of financial resources is also taken into account:

"OCCASIONAL" for example, on an infrequent, one-off, or ad hoc basis.

"REGULAR" for example, as part of the pattern of normal working, on a quarterly, monthly, fortnightly or weekly basis.

The definitions of 'service', 'function' and 'department' will need to be considered in the context of the organisational hierarchy and the descriptors used at its various levels, for example, a range of activities might be delivered within a single service, a number of services might make up the function, and that function might be one of a number within a department.

“ACTIVITY” in this context generally equates to the work of a single team or section delivering one of a range of activities within a service

“SERVICE” in this context generally equates to a number of teams or sections delivering a range of related activities, for example, treasury management and budget preparation might be activities within the accounting service

“FUNCTION” in this context generally equates to a number of services relating to a professional discipline for example, accounting and audit might be services within the finance function

“DEPARTMENT” in this context generally equates to a range of functions managed together at a strategic level within the organisation, for example, both Finance and the Legal, Regulatory & Governance Division might be among a number of functions within the Corporate Support Department

“CORPORATE” in this context generally equates to, for example, multi-functional, multi-departmental or Council wide initiatives.

Accounting for / Auditing of Financial Resources

For the purposes of evaluation **at 1999 values**, subject to application of local 'ready reckoner' to ensure consistency:

"SMALL" refers to amounts of less than £500,000 per year

"CONSIDERABLE" refers to amounts of £500k - £5m per year.

"LARGE" refers to amounts of £5m - £10m per year.

"VERY LARGE" refers to amounts of more than £10m per year.

Security

Account is taken of the responsibility for the safe storage and/or transport of cash or equivalent, for example, to make bank deposits or collection from remote cash/vending/toll machines/meters.

For the purposes of evaluation **at 1999 values** subject to application of local 'ready reckoner' to ensure consistency:

"CONSIDERABLE" generally refers to the security of thousands of pounds per week, up to £500,000 per year in total. Those responsible for lesser amounts would generally be considered to be handling cash rather than responsible for its security, unless they are responsible for collection or banking of monies.

"LARGE" generally refers to amounts of more than £10,000 per week up to £2.5m per year in total.

"VERY LARGE" generally refers to amounts of more than £50,000 per week, up to £5m or more per year in total.

Budgetary Responsibility

Covers **all** aspects of budgetary activity including compiling, estimating, monitoring, income generation, expenditure, assessment of risk/investment etc. - for **all** types of budgets - income, expenditure, project etc.:

- A "CONTRIBUTING" role would include the preparation, provision, analysis, etc. of any information which is to be used by those who actually prepare or set the budget(s) concerned.
- A "MONITORING" role would include any significant validating activity which, in whole or in part, DIRECTLY influences the outcome of the budget setting process.
- The "LEADING" role means being the officer leading the budget setting process.
- The "CONTROLLING" role is the officer accountable to the director for the budget as a whole.
- The "DETERMINING" role is the officer accountable for the budget, i.e. as per the Council's delegated authority for financial resources. As per the dictionary definition 'to put terms or

bounds to, to limit, to fix or settle, to put an end to, to come to a decision' - alternatives:
decide, settle on, conclude, resolve, establish, agree on

This refers to the total budget for which the jobholder is wholly or partly responsible. For the purposes of evaluation **at 1999 values** subject to application of local 'ready reckoner' to ensure consistency:

"SMALL" i.e. up to £100,000

"CONSIDERABLE" i.e. over £100,000 and up to £500,000

"LARGE" i.e. over £500,000 and up to £2.5m

"VERY LARGE" i.e. over £2.5m and up to £10million

"EXTREMELY LARGE" i.e. over £10 million.

Staff costs - should be included in total budgetary figures; the level of the responsibility may be affected by the degree of discretion which the jobholder has over such costs.

Income Collection and Generation

Responsibilities for income collection and generation should also be taken into account, for example:

- "bidding" for grants from Government, the European Commission and other grant giving bodies;
- developing financial partnership arrangements with the private sector;
- collection of Council Tax and other revenues.

Income generation and expenditure sums should **not be counted twice**, but the **nature of the combined** responsibility should be taken into account.

Equivalent Levels of Responsibility - it is impossible to specify all forms of financial responsibility, as many jobs in many departments may contribute to the overall accounting or accountability responsibility, for example, finance officers in corporate finance, departmental finance officers, service budget holders, cashiers, invoice checkers etc. In determining equivalences, it is important to look at the nature of the responsibility, the frequency with which it is exercised, the scale of the responsibility and so on of each job.

* **NOTE:** Values have been set at 1999 levels to cover the range of financial responsibilities across the Scottish job population as a whole. These values should be applicable in the majority of individual authorities. However, depending on their financial structure and their hierarchy of accountability, some authorities may experience difficulty in fitting their jobs within the ranges used. In these circumstances, and subject to local agreement, alternative ranges must be developed for application to the whole job population by arrangement with COSLA. The necessary alterations to the software will then be carried out by Pilat (UK) Ltd. The cost of any such alterations will be borne by the individual Council.

N.B. Ensuring consistency of application of the value ranges used in the level definitions

The values ranges were set in 1999 during the development of the Scheme; and as such were initially applied during the benchmarking stage as part of the local implementation of the SJC 'Single Status' Agreement. In order to ensure consistency of application on an on-going basis authorities will need to consider whether it is necessary develop a 'ready reckoner' as part of their local guidance to maintain a clear link between the 1999 value ranges and the equivalent range in their current scheme of financial delegation. Applying a percentage uplift to reflect the rate of inflation since 1999 may not be appropriate as Council budgets have not increased in this way; and changes in organisation structure may have resulted in a variety of changes to the size of financial resources as responsibilities are combined or altered.

To develop a local 'ready reckoner' local Job Analyst teams should review the evaluation of benchmark jobs in order to identify:

1. Groups of jobs for which the size of financial resources has been assessed within each of the ranges specified for:
 - Accounting for, auditing of, financial resources
 - Security of financial resources
 - Budgetary responsibilities
2. What the actual size of financial resources was at the time of the benchmark evaluations for each job – and thereby the range of actual resources assessed across each of the identified groups of assessments
3. Which of the jobs are unchanged since the initial evaluation and which have changed; and what effect the change has had in terms of responsibility for financial resources
4. The size of current resources/budgets for which the unchanged jobs now have responsibility; and thereby the range of resources now covered within each category

Once the new ranges have been identified for budgetary responsibilities consideration should be given to how the new ranges relate to the scheme of financial delegation to ensure that degree of responsibility remains the primary basis on which the job is assessed.

If a 'ready reckoner' needs to be developed it should be:

- agreed as part of local guidance
- made available to staff, managers and trades union representatives along with the guidance on Factor 10 – in both paper schemes and on the intranet
- incorporated into the evaluation process

In order to reflect the updated ranges in Job Overview Documents – bearing in mind that this exercise may have to be repeated in another 10 or so years – consideration should be given to:

- adding the relevant information from the 'ready reckoner' into the comments box of appropriate questions when assessing jobs – and providing full JODs which include comments
- a local alteration to the COSLA Gauge software as per the facility provided in the **Note** at the end of the Factor Guidance

FACTOR 10 - RESPONSIBILITY FOR FINANCIAL RESOURCES

This factor considers the jobholder's predominant responsibility for financial resources.

It covers responsibility for cash, vouchers, cheques, debits and credits, invoices, and responsibility for the range of budgetary activities - including project, expenditure and income budgets, income generation and the generation of savings, assessments of risk/grants, loans/investments.

It takes into account the nature of the responsibility, for example, accuracy, processing, checking, safekeeping, security, authorising, monitoring, accounting, auditing, budgeting, estimating, business and financial planning, control and long-term development of financial resources. It also takes into account the need to ensure economy, efficiency and effectiveness in the use of financial resources, and the need to ensure financial probity.

The factor takes into account the extent to which the jobholder contributes to the overall responsibility, rather than just the value of the financial resources.

FACTOR 10 - RESPONSIBILITY FOR FINANCIAL RESOURCES

Level	Definition
1	<p>The job predominantly involves responsibility for either:</p> <p style="padding-left: 20px;">1 the proper use and safekeeping of vouchers or equivalent required to undertake specific tasks of the job</p> <p style="padding-left: 20px;">or</p> <p style="padding-left: 20px;">2 handling cash, processing cheques, invoices or equivalent on an occasional basis</p> <p style="padding-left: 20px;">or</p> <p style="padding-left: 20px;">3 the job has no responsibility for financial resources.</p>
2	<p>The job predominantly involves responsibility for either:</p> <p style="padding-left: 20px;">1 handling cash or processing cheques, invoices or equivalent on a regular or daily basis</p> <p style="padding-left: 20px;">or</p> <p style="padding-left: 20px;">2 accounting for, or auditing of, small to considerable sums of money, in the form of cash, cheques, direct debits, invoices, or equivalent</p> <p style="padding-left: 20px;">or</p> <p style="padding-left: 20px;">3 security of small to considerable sums of money, in the form of cash, cheques, direct debits, invoices, or equivalent</p> <p style="padding-left: 20px;">or</p> <p style="padding-left: 20px;">4 being accountable for, or monitoring, small to considerable expenditures from an agreed budget or equivalent income.</p>

FACTOR 10 - RESPONSIBILITY FOR FINANCIAL RESOURCES

Level	Definition
3	<p>The job predominantly involves responsibility for either:</p> <p>1 accounting for, or auditing of large sums of money, in the form of cash, cheques, direct debits, invoices, or equivalent</p> <p>or</p> <p>2 security of large sums of money, in the form of cash, cheques, direct debits, invoices, or equivalent</p> <p>or</p> <p>3 being accountable for, or monitoring, large to very large expenditures from an agreed budget(s) or equivalent income</p> <p>or</p> <p>4 contributing to setting and monitoring small to considerable budget(s), and ensuring value-for-money and/or effective utilisation of financial resources.</p>
4	<p>The job predominantly involves responsibility for either:</p> <p>1 accounting for or auditing of very large sums of money, in the form of cash, cheques, direct debits, invoices, or equivalent</p> <p>or</p> <p>2 security of very large sums of money, in the form of cash, cheques, direct debits, invoices, or equivalent</p> <p>or</p> <p>3 being accountable for, or monitoring, extremely large expenditures from an agreed budget(s) or equivalent income</p> <p>or</p> <p>4 contributing to setting and monitoring large to very large budget(s), and ensuring value-for-money and/or effective utilisation of financial resources</p> <p>or</p> <p>5 leading the budget setting process, controlling small to considerable budget(s), and ensuring value-for-money and effective utilisation of financial resources</p> <p>or</p> <p>6 determining small budget(s) and long-term financial planning to meet service/functional/departmental or other requirements.</p>

FACTOR 10 - RESPONSIBILITY FOR FINANCIAL RESOURCES

Level	Definition
5	<p>The job predominantly involves responsibility for either:</p> <p>1 managing the accounting / audit process, and ensuring financial probity in the use of financial resources at service/functional/ departmental level</p> <p>or</p> <p>2 contributing to setting and monitoring extremely large budget(s), and ensuring value-for-money and/or effective utilisation of financial resources</p> <p>or</p> <p>3 leading the budget setting process, controlling large to very large budget(s), and ensuring value-for-money and effective utilisation of financial resources</p> <p>or</p> <p>4 determining considerable or large budget(s) and long-term financial planning to meet service/functional/departmental or other requirements</p>
6	<p>The job predominantly involves responsibility for either:</p> <p>1 managing the accounting/audit process at multi-functional/multi-departmental level, and ensuring probity in the use of financial resources at multi-functional/multi-departmental level</p> <p>or</p> <p>2 leading the budget setting process, controlling extremely large budget(s), and ensuring value-for-money and effective utilisation of financial resources</p> <p>or</p> <p>3 determining very or extremely large budget(s) and long-term financial planning to meet service/departmental/functional or other requirements.</p>
7	<p>The job predominantly involves responsibility for either:</p> <p>1 controlling the corporate accounting/audit function, and ensuring probity in the use of financial resources at corporate level</p> <p>or</p> <p>2 determining budget(s) and long-term financial planning to meet multi-functional or corporate requirements.</p>

FACTOR 11 - RESPONSIBILITY FOR PHYSICAL & INFORMATION RESOURCES

Scope of Factor

This factor takes account of the fact that jobs often have different levels of responsibility for different types of resources – excluding all human resources which should be considered under the factor heading 'Responsibility for Employees'. The job should be evaluated according to the **highest level** of either primary **or** secondary responsibility for physical or information resources. For example, a job having a primary responsibility for the proper use and safekeeping of very expensive equipment and secondary responsibility for ordering and/or stock control of a limited range of supplies should be assessed at Level 3 in line with the first of these features. Job Analysts should take care to set the jobholder's responsibility in context and ensure they understand its place in the organisational hierarchy; and can therefore assess the job's responsibilities in relation to those of the immediate line manager, senior management, Head of Service etc but also in relation to the responsibilities of colleagues and subordinates.

Job Analysts should consider the extent to which the 'step changes' in demand defined at different level definitions may reflect the 'step changes' in degrees of responsibility carried by posts at different levels in the operational hierarchy, for example, in relation to a project involving the adaptation, design, development or management of physical resources:

- a number of jobholders may share some responsibility through their '**contributing**' role in the project
- their immediate line manager may carry individual responsibility through their '**supervising**' role for the project
- while a more senior colleague may carry responsibility for '**managing**' the project
- and overall responsibility for the project is carried by senior management in their '**planning**' role

Application of the Level Definitions

Where a job has an equivalent level of responsibility for **both** primary and secondary resources, the cumulative demands at that level of responsibility are considered to be equivalent to the next level, above Level 3. For example, a job having both a primary and secondary responsibility at Level 4, is considered equivalent to a job having a primary responsibility at Level 5 with a secondary responsibility at a lower level.

"PRIMARY" refers to the **main** types of resources for which the jobholder is responsible in the course of normal working, i.e. in terms of the FREQUENCY AND/OR DURATION with which the jobholder uses/ deploys/ utilises/ maintains/ repairs/ secures/ manages/ adapts/ designs/ develops/ purchases etc., these resources. This need **not** relate to the overall value of specific resources.

"SECONDARY" refers to any other resources for which the jobholder has **less** responsibility in terms of the frequency and duration with which the jobholder is required to exercise responsibility, **not** to resources which are of lesser value.

N.B. – The evaluation of a job need not include assessment of demands in respect of both a physical resource **and** an information resource; in some cases, it may be more appropriate to assess the demands in respect of two different physical resources, for example, security of premises **and** proper use and safekeeping of vehicles/equipment.

Nature of Responsibility:

For Plant, Tools and Equipment

Consideration is given to the **nature** of the responsibility for **physical** resources used by the jobholder, such as **plant, tools, equipment, vehicles** etc.

"USE AND SAFEKEEPING" i.e. proper use of equipment, tools, plant and machinery in accordance with manufacturers' instructions and any relevant training. This includes reporting of faults as appropriate. Proper shut-down and storage of equipment, tools, plant and machinery when not in use including securing items if necessary, for example, closing down a PC at the end of the working day, returning mobile plant to depot, securing chemicals in locked cupboard, handing in keys to security etc

"MAINTAIN" includes undertaking daily checks, routine maintenance and full maintenance such as servicing and repairs as part of a programme of planned/ preventative maintenance.

"DAILY CHECKS" includes cleaning of equipment, and the checking of oil, water and tyres, checking temperature levels of fridges/freezers, changing toner cartridge on a printer, greasing plant, replacing bag on vacuum cleaner, etc.

"ROUTINE MAINTENANCE" includes conducting operational inspections AND undertaking minor repairs required as a result, such as changing fuses/lighting fitments, changing a car tyre/batteries or other tasks involving the application of specialist knowledge/skills.

"FULL MAINTENANCE" refers to servicing and repairs as part of a programme of planned/preventative maintenance.

"SUPERVISE PROPER USE" generally refers to on site supervision of specified tasks.

"ENSURE" generally refers to responsibility for specified activities which is exercised remotely, and may include checks on supervision.

"MANAGE" includes, for example, deployment of equipment and resources, and scheduling their use, maintenance and repair, replacement etc.

"DEPLOY" includes, for example, organising the use, maintenance, repair, replacement of equipment and resources:

- "A RANGE OF RESOURCES" – generally within a single location such as a central store, transport depot, museum, leisure centre etc
- "A WIDE RANGE" – generally across multiple sites or locations.

Value

In considering the value of physical resources the following equivalencies should be used:

- Equipment of “MODERATE” value (at Level 1) will include electronic equipment such as laptop/docking station, tablet, printer, vacuum cleaner, food mixer, pedestrian lawn mower, scanner, chainsaw, cement mixer, slicing machine etc.
- “EXPENSIVE” equipment (at Level 2) will include a car (used for Local Authority purposes), a minibus or transit van (used for transporting passengers or goods), industrial dishwasher, ride-on mower, equivalent value workshop equipment etc.
- “VERY EXPENSIVE” equipment (at Level 3) will include heavy plant, a refuse lorry or similarly adapted large vehicle, an ICT system/bank of servers (where the jobholder has active responsibility for its operation), responsibility for a dedicated in-house printing system or operation.

For Information

Consideration is also given to the **nature** of responsibility for paper based or electronic **information** systems as a resource, for example, database, filing system, records, reference materials/library. The jobholder's responsibility covers activities such as data input, filing, maintenance and creation or development of information resources; and those relating to the Council's obligations in respect of Data Protection regulations and Freedom of Information requests, rather than simply referring to the information to carry out day to day tasks.

“PERSONAL” i.e. information pertaining to specific individuals

“CONFIDENTIAL OR COMMERCIALY SENSITIVE” i.e. information pertaining to organisational matters or the business context

"HANDLING/PROCESSING" refers to data input, transfer, collation and filing, which may not require the jobholder to have a full working knowledge and appreciation of the information.

"ACCESSING" refers to the interrogation, analysis and verification of information, which requires the jobholder to have a full working knowledge of the subject matter.

"DATA INPUT" refers to data entry, transfer and collation, which may not require the jobholder to have a full working knowledge and appreciation of the information.

"CREATING AND/OR UPDATING" refers to determining the need for new/additional files to be opened, compiling information and determining its relevance, which requires the jobholder to have a full working knowledge and appreciation of the information.

"KEEPING RECORDS" refers to the responsibility for maintaining records kept by the Authority for statutory purposes.

"ORGANISING/MAINTAINING" refers to the operational determination/ design of the detailed structure of the information SYSTEM, ensuring the integrity and relevance of the data, establishing links to related information systems and ensuring appropriate security, access and housekeeping arrangements are in place. The jobholder will generally require a full working knowledge and appreciation of the purpose, functionality and content of the information SYSTEM.

"DEVELOPING/MANAGING" refers to identification and assessment of options against available resources, project management of quality and time scale, ensuring system objectives are fulfilled, and reviewing performance on an on-going basis.

"ADAPTING/DESIGNING" - typically refers to computerised information systems; and also includes identification and appraisal of options against available resources, project management of quality and timescale, ensuring system objectives are fulfilled, and reviewing performance on an on-going basis.

"PLANNING" refers to identifying and anticipating strategic information requirements in both the short and long term, and determining the related resource implications. **N.B.** this responsibility will typically be carried by senior posts but it should be borne in mind that less senior staff also contribute to planning activities.

For Supplies and/or Stocks

Consideration is given to the **nature** of the responsibility for physical resources such as **supplies and/or stocks**:

"REQUISITIONING" generally refers to an internal request for items from existing stores or stock, which may not need countersignature.

"ORDERING" generally refers to a request for items which may have to be specifically purchased from an external supplier, and which will generally require countersignature. **N.B.** This does NOT include responsibility for processing purchase orders which should be considered under either:

- This factor heading – as processing of information
- Or
- The 'Responsibility for Financial Resources' factor heading – as indirect responsibility for processing financial documentation

NOTE: Care must be taken to avoid double-counting of the same job demand under two or more factor headings.

"PURCHASING" generally refers to the authorisation/countersignature of externally supplied orders up to a predetermined limit/value.

"PROCUREMENT" generally refers to the strategic function of "buying" on behalf of the authority, and includes tendering.

"STOCK CONTROL" generally refers to ensuring an appropriate supply of items in store, and anticipating likely demand.

Consideration is also given to the **degree** or extent of the responsibility for supplies and/or stocks:

"LIMITED" for example, office stationery or food supplies for a school kitchen or vehicle parts for a workshop, etc.

"RANGE" for example, food supplies AND equipment for a school kitchen; office stationery AND furniture; or highways maintenance equipment AND planning.

For Security

Consideration is given to the **nature** and degree of responsibility for the safeguarding of physical resources, including **buildings, premises, and other locations such as depots and their contents**.

Examples of “limited responsibilities” (at Level 2) include:

- Keyholder responsibility for all of a building, external location or construction site
- Responsibility for opening/closing one or more buildings with keys
- Checking windows, switching on alarm systems where there is no caretaker
- Daily monitoring of individuals and/or physical resources entering and leaving premises

Examples of greater security responsibilities (at Level 3) include acting as security guard, caretaker or attendant where this is a major job feature.

“SECURITY” generally refers to responsibility for safeguarding the security of physical resources such as buildings, premises and other locations such as depots, and their contents.

“KEYHOLDING” i.e. jobholders who hold keys for access and egress to/from buildings, including out of office hours.

“NOMINATED KEYHOLDER” i.e. individuals who are nominated points of contact for protective services (police and fire)/security firms etc in emergency situations or when alarms sound etc

Responsibility for “MANAGING” the security of physical resources includes ensuring appropriate security measures are in place and monitoring their effectiveness. This includes responsibility for overseeing security systems and arrangements provided either internally or externally. Examples of managing security include:

- “A RANGE OF RESOURCES” – generally within a single location such as a central store, transport depot, museum, leisure centre etc
- “A WIDE RANGE” – generally across multiple sites or locations.

For Buildings

Consideration is given to the **nature** and degree of responsibility for **buildings**:

“BUILDINGS” refers to **all** responsibilities in respect of the full range of buildings, premises, construction sites and other locations, for example:

- Cleaning of premises (at Level 1)
- Ensure proper cleaning, repair and maintenance (at Level 2)
- Manage, repair/maintain a range of premises (at Level 3)
- Supervise the design adaptation or development process of a range of premises with a considerable value (at Level 4)
- Utilisation/acquisition/disposal of a range of high value premises (at Level 5)
- Design and planning of a range of premises over the long term (at Level 6)

“LIMITED” range of land, buildings, other construction works or equivalent, for example, located on one site, part of one construction project

“WIDER” range of land, buildings, other construction works or equivalent, for example, located across a number of sites, included in more than one construction project

“SHORT TERM” – i.e. generally periods of up to 3 years

“LONG TERM” – i.e. generally periods of more than 3 years

For evaluation purposes **at 1999 values** subject to application of local ‘ready reckoner’ to ensure consistency:

"CONSIDERABLE" value would be up to £250,000

"HIGH" value would be more than £250,000

Degree of Responsibility

Consideration is also given to the **degree** or extent of responsibility for physical or information resources:

The definitions of 'service', 'function' and 'department' will need to be considered in the context of the organisational hierarchy and the descriptors used at its various levels, for example, a range of activities might be delivered within a single service, a number of services might make up the function, and that function might be one of a number within a department.

“ACTIVITY” in this context generally equates to the work of a single team or section delivering one of a range of activities within a service

“SERVICE” in this context generally equates to a number of teams or sections delivering a range of related activities, for example, treasury management and budget preparation might be activities within the accounting service.

“FUNCTION” in this context generally equates to a number of services relating to a professional discipline for example, accounting and audit might be services within the finance function.

“DEPARTMENT” in this context generally equates to a range of functions managed together at a strategic level within the organisation, for example, both Finance and the Legal, Regulatory & Governance Division might be among a number of functions within the Corporate Support Department.

“CORPORATE” in this context generally equates to, for example, multi-functional, multi-departmental or Council wide initiatives.

"CONSORTIUM" in this context generally equates to partnership arrangements between the Council and external organisations such as other local authorities, joint boards and voluntary organisations.

N.B. Ensuring consistency of application of the values used in the level definitions

The values were set in 1999 during the development of the Scheme; and as such were initially applied during the benchmarking stage as part of the local implementation of the SJC 'Single Status' Agreement. In order to ensure consistency of application on an on-going basis authorities will need to consider whether it is necessary develop a 'ready reckoner' as part of their local guidance to maintain a clear link between the 1999 values and the equivalent range in their current scheme of financial delegation. Applying a percentage uplift to reflect the rate of inflation since 1999 may not be appropriate as Council budgets have not increased in this way; and changes in organisation structure may have resulted in a variety of changes to the value of resources as responsibilities are combined or altered.

*** NOTE:** Values have been set at 1999 levels to cover the Scottish job population as a whole. These values should be applicable in the majority of individual authorities. However, depending on their financial structure and their hierarchy of accountability, some authorities may experience difficulty in applying these values to their jobs. In these circumstances, and subject to local agreement, alternative values must be developed for application to the whole job population by arrangement with COSLA. The necessary alterations to the software will then be carried out by Pilat (UK) Ltd. The cost of any such alterations will be borne by the individual Council.

FACTOR 11 - RESPONSIBILITY FOR PHYSICAL AND INFORMATION RESOURCES

This factor considers the jobholder's primary and secondary responsibilities for the Council's physical and information resources.

It covers tools, equipment, instruments, vehicles, plant and machinery, materials, goods, produce, stocks and supplies, paper based or electronic information used in the course of normal working. It also covers responsibility for offices, buildings, fixtures and fittings; Council databases, information systems and records; land and construction works.

It takes into account the nature of the jobholder's primary responsibility for resources and any secondary responsibility, for example, safekeeping, confidentiality and security; deployment and control; maintenance and repair; requisition and purchasing; planning, organising, or design and long-term development of physical or information resources.

The factor takes into account the degree to which the jobholder contributes to the overall responsibility, and the value of the resource.

FACTOR 11 - RESPONSIBILITY FOR PHYSICAL AND INFORMATION RESOURCES

Level	Definition
1	<p>The job involves a primary responsibility for either:</p> <ol style="list-style-type: none"> 1. the proper use and safekeeping of physical resources such as equipment of moderate value. This may include daily checks such as oil/water levels etc and/or reporting of faults/breakdowns <p>or</p> <ol style="list-style-type: none"> 2. handling or processing of routine information such as data input or filing <p>or</p> <ol style="list-style-type: none"> 3. cleaning of buildings, premises, external locations or equivalent etc <p>or</p> <ol style="list-style-type: none"> 4. requisitioning supplies for immediate use.
2	<p>The job involves a primary responsibility for either:</p> <ol style="list-style-type: none"> 1. proper use and safekeeping of expensive equipment, including daily checks and reporting of faults/breakdowns etc <p>or</p> <ol style="list-style-type: none"> 2. handling and processing of confidential, personal, commercially or otherwise sensitive information; or accessing information, for example, creating and/or updating files or keeping records <p>or</p>

**FACTOR 11 - RESPONSIBILITY FOR PHYSICAL AND
INFORMATION RESOURCES**

Level	Definition
	<p>3. organising, maintaining, filing and/or record systems for own use or by team/colleagues</p> <p>or</p> <p>4. ensuring / supervising the proper use, safekeeping, cleaning and/or maintenance of buildings, premises, external locations or equivalent</p> <p>or</p> <p>5. undertaking routine maintenance of moderately expensive plant or equipment</p> <p>or</p> <p>6. ordering and/or stock control of a limited range of supplies for use by jobholder and team/colleagues</p> <p>or</p> <p>7. limited responsibility for security of plant, tools and equipment or buildings, external locations or equivalent, this may include setting alarms and keeping keys for access/egress</p>
<p>3</p>	<p>The job involves a primary responsibility for either:</p> <p>1. proper use and safekeeping/routine maintenance of very expensive plant, equipment or equivalent resources</p> <p>or</p> <p>2. organising, maintaining, filing and/or record systems for use at departmental/functional level, or for access by other departments or external users</p> <p>or</p> <p>3. managing the deployment of a range of plant, tools, equipment and other physical resources</p> <p>or</p> <p>4. undertaking full repairs and maintenance of plant, equipment and premises, including preventative or planned maintenance</p> <p>or</p> <p>5. identifying resource requirements; or the need for and ordering, and/or stock control of, a range of equipment and supplies</p> <p>or</p> <p>6. security of plant, tools, equipment or buildings, external locations or equivalent, as a caretaker <i>or</i> nominated keyholder for emergencies</p> <p>or</p> <p>7. contributing to the adaptation, design or development of a limited range of land, buildings, other construction works or equivalent</p> <p>or</p>

FACTOR 11 - RESPONSIBILITY FOR PHYSICAL AND INFORMATION RESOURCES

Level	Definition
	<p>8. contributing to the utilisation, acquisition and disposal of a limited range of land, buildings, premises, other construction works or equivalent</p> <p>or</p> <p>9. contributing to the adaptation, design, development or management of information systems</p> <p>or</p> <p>10. contributing to the review or planning the development of physical resources or information systems in the short term</p>
4	<p>The job involves a primary responsibility for either:</p> <p>1. adapting, designing, developing or managing of departmental/functional information systems, this may include responsibility for ensuring the proper completion and safekeeping of statutory records</p> <p>or</p> <p>2. contributing to the adaptation, design or development of a wider range of land, buildings, premises, other construction works or equivalent</p> <p>or</p> <p>3. contributing to the utilisation, acquisition and disposal of a wider range of land, buildings, premises, other construction works or equivalent</p> <p>or</p> <p>4. managing the deployment of a wide range of plant, tools, equipment and other physical resources</p> <p>or</p> <p>5. managing the security of a range of physical resources</p> <p>or</p> <p>6. tendering and/or procurement and deployment of equipment and supplies at a sectional/service level</p> <p>or</p> <p>7. purchasing within delegated limits as an authorised signatory; or determining the need for additional resources or supplies at a sectional or service level, and/or authorising their purchase and deployment</p> <p>or</p> <p>8. contributing to the tendering or procurement process at a departmental/functional level</p> <p>or</p> <p>9. supervising, or responsible for, the adaptation, design or development of a range of land, buildings, premises, other construction works or equivalent of a considerable value</p> <p>or</p>

FACTOR 11 - RESPONSIBILITY FOR PHYSICAL AND INFORMATION RESOURCES

Level	Definition
	<p>10. supervising, or responsible for, the utilisation, acquisition and disposal of a range of land, buildings, premises, other construction works or equivalent of a considerable value</p> <p>or</p> <p>11. the review or planning the development of departmental/functional physical resources or information systems in the short term</p> <p>or</p> <p>12. contributing to the review or planning the development of physical resources or information systems in the longer term</p> <p>OR</p> <p>BOTH a primary and secondary responsibility for resources as described by the demands identified at Level 3.</p>
<p>5</p>	<p>The job involves a primary responsibility for either:</p> <p>1. adapting, designing, developing or managing multi-functional/multi-departmental, corporate or Council wide information systems, databases or archives – including those for external use, for example, Financial Management System, HR System, Electoral Register</p> <p>or</p> <p>2. supervising or responsible for the adaptation, design, development, of a high value range of land, buildings, premises, other construction works or equivalent</p> <p>or</p> <p>3. supervising or responsible for the utilisation, acquisition or disposal of a high value range of land, buildings, premises, other construction works or equivalent</p> <p>or</p> <p>4. managing the security of a wide range of physical resources</p> <p>or</p> <p>5. tendering and/or procurement of resources or supplies at a departmental/functional level</p> <p>or</p> <p>6. contributing to long-term planning of the Council’s physical or information resources to meet departmental/functional or other requirements</p> <p>or</p> <p>7. short-term planning of the Council’s physical or information resources to meet multi-departmental, multi-functional, corporate, or external requirements</p> <p>OR</p>

**FACTOR 11 - RESPONSIBILITY FOR PHYSICAL AND
INFORMATION RESOURCES**

Level	Definition
	BOTH a primary and secondary responsibility for resources as described by the demands identified at Level 4.
6	<p>The job involves a primary responsibility for either:</p> <ol style="list-style-type: none"> 1. long-term planning of the Council's physical or information resources to meet multi-functional, multi-departmental, corporate or external requirements <p style="text-align: center;">or</p> <ol style="list-style-type: none"> 2. tendering and/or procurement of resources or supplies on a multi-functional, multi-departmental, corporate, Council wide or Consortium basis <p style="text-align: center;">OR</p> <p>BOTH a primary and secondary responsibility for resources as described by the demands identified at Level 5.</p>
7	The job involves BOTH a primary and secondary responsibility for resources as described by the demands identified at Level 6.

FACTOR 12 - INITIATIVE AND INDEPENDENCE

Scope of Factor

This factor takes account of the problems which the jobholder must deal with in the course of normal working, the decisions which the jobholder is able to take, and the extent to which advice and guidance is available. Job Analysts should take care to set the jobholder's responsibility in context and ensure they understand its place in the organisational hierarchy; and can therefore assess the job's responsibilities in relation to those of the immediate line manager, senior management, Head of Service etc but also in relation to the responsibilities of colleagues and subordinates in terms of how these are reflected in the 'step' changes set out in the level definitions.

Where a level definition includes a **range** of criteria for meeting the level of demand, the **majority** of the elements must be regular features of the job to justify scoring at that level. Where the job demonstrates only one aspect of the range of demands at a particular level, it will generally be assessed at a lower level.

N.B. The Gauge 'Evaluator' software does this automatically, but when using the paper based JE Scheme Job Analysts need to be aware that both paragraphs within the definitions of Levels where they are separated by the word '**and**' need to be satisfied for a job to be assessed at that level; and that combinations of demands from different levels should be assessed at the lower level.

Nature of Demand

Consideration is given to the nature and degree of **discretion** which the jobholder has in the course of normal working:

"WORKING TO INSTRUCTIONS" i.e. the jobholder's duties are described in detail either in writing or verbally e.g. the jobholder may be given a route to follow or a specified list of tasks.

Following routine "WORKING PRACTICE" i.e. in the absence of written instructions the jobholder works to established practices which indicate the routine tasks and how the job is to be done.

Following "ESTABLISHED PROCEDURES" i.e. the jobholder may determine the appropriate steps to take in specific circumstances, although the actual tasks undertaken may not be documented. This includes procedures established by statutory regulations and legislation.

Working within "POLICY GUIDELINES" i.e. the jobholder operates within clearly defined service/departmental/functional policy guidelines which may be referred to where there is little or no established procedure or practice.

Working within "LEGISLATIVE FRAMEWORK OR REGULATION" i.e. the jobholder has responsibilities for implementation and monitoring of legislation and regulation.

Working within the broad "FRAMEWORK OF COUNCIL POLICY" i.e. the jobholder has autonomy to operate within the boundaries or parameters of Committee/Council decisions which may not have been translated into formal guidelines or procedures.

NOTE: All work is undertaken within **Council policies**, including their development. Absence of reference to Council policies at any given level in this factor does not mean that these levels are not within Council policies, but that they are also subject to more detailed procedures, which themselves are within Council policies.

Nature of Demand

Consideration is given to the **nature** of the problems which the jobholder is required to **deal with** in the course of **day to day** working:

“ROUTINE” for example, problems which are generally similar and are covered by established practice.

“PREDICTABLE” for example, problems that may occur intermittently but are generally covered by recognised policy, procedures or practice, although the particular circumstances may vary.

“UNANTICIPATED” for example, problems which have not occurred before, could not reasonably have been foreseen, and / or have implications for policy, procedure or practice.

"UNUSUAL" for example, out with the range of normal problems, but to which policy or procedure may provide guidance.

"DIFFICULT" for example, the solution is not readily apparent, but relevant precedents may apply.

"SERIOUS" for example, may have wider implications in a policy or functional context.

Degree of Demand

Consideration is also given to the **extent** to which the jobholder may take decisions / action, or must seek advice and guidance, to resolve problems:

“EXERCISE DISCRETION” refers to the authority to take decisions without referral upwards.

“PROBLEMS ARE REFERRED TO A SUPERVISOR” i.e. the jobholder is not expected to deal with the problem but to refer it for someone else's attention.

“GUIDANCE IS READILY AVAILABLE” i.e. the jobholder is expected to attempt to deal with problems, but would be assisted if the problem turns out to be out with their experience or remit.

"GUIDANCE IS READILY ACCESSIBLE" i.e. jobholder and line manager generally work closely together, advice and guidance is provided through regular discussion.

"GUIDANCE IS AVAILABLE AS AND WHEN REQUIRED" i.e. the jobholder generally works autonomously and will decide when to seek advice or guidance.

"GUIDANCE IS NOT READILY ACCESSIBLE" i.e. advice and guidance may need to be sought from a variety of sources (internal and/or external) rather than primarily from line management. **NOTE:** This does **not** refer to the **physical** location or availability of the jobholder's immediate line manager, but to the working relationship.

"WITHOUT RECOURSE" i.e. the jobholder works autonomously on high level issues and may seek the views of others rather than 'advice', for example, in roles with specific

delegated authority for statutory obligations. 'Guidance' is provided by strategic direction.

Joint Decision Making - the nature and extent of the jobholder's contribution to joint decision making by different people, departments or committees should be taken into account in assessing the level of initiative. The sharing of decision making and action taking may reduce the level of initiative.

Scope of Demand

Consideration is also given to the **extent** of the jobholder's discretion:

- Over "a LIMITED RANGE of activities" for example, activities found within a single team/unit.
- "A RANGE of activities" for example, activities across a number of teams/units.
- "A BROAD RANGE of activities" for example, activities across a service.
- "A VERY BROAD RANGE" for example, activities across a function/department/the authority.

Managerial Direction

The amount, level and degree of managerial direction which the jobholder is subject to, is also considered:

"SUBJECT TO" i.e. the jobholder's overall activities and workload are directed by line management.

"CONSULTS" i.e. the jobholder decides when managerial direction is required.

"GENERAL" i.e. the jobholder works semi-autonomously under broad direction.

"MINIMAL" i.e. the jobholder is generally working autonomously.

"OPERATIONAL" refers to day to day advice on matters outwith the scope of the job, for example, from line manager.

"MANAGERIAL" refers to the broad parameters/objectives of the job.

"PROFESSIONAL" refers to advice from senior or more experienced colleagues on specialist matters.

Policy / Strategy

Consideration is given to the **nature** of the jobholder's role in the development of policy/strategy, and/or implementation and monitoring of legislation and regulation, where this is the **predominant** nature of the job, and to involvement in ad-hoc or one-off projects or secondments. Policy/strategy development does **not** refer to strategic planning or implementation.

"CONTRIBUTE" i.e. on a regular basis as a member of a project team/working party/departmental management etc.

"LEAD" i.e. the jobholder plays a leading role, for example, as Chair of a working party.

"RECOMMENDATIONS" i.e. jobholders may **contribute** to the decisions of others by making recommendations. The initiative involved in making such recommendations should be taken into account. The level of initiative in making recommendations will depend on how close to or far from the relevant decision making they are, their degree of influence, the breadth of activity to which they relate, and the degree of direction provided.

Approval/ratification of policy and/or strategy developed by the jobholder refers to the jobholder's **INDIVIDUAL** responsibility or authority in relation to the development of policy and/or strategy, rather than the jobholder's contribution to a working party or management team. For example, as designated/lead officer or working party chairperson.

Consideration is also given to the **extent** of the jobholder's involvement in the development of policy/strategy and/or implementation and monitoring of legislation and regulation:

"ON-GOING" i.e. development of policy and/or strategy, and/or implementation and monitoring of legislation and regulation, is an integral aspect of the jobholders responsibility.

"OCCASIONAL INPUT" i.e. contributions to working parties etc. where development of policy and/or strategy, and/or implementation and monitoring of legislation and regulation, is an ad-hoc feature of the job, rather than the jobholder's primary responsibility.

Scope to Exercise Discretion

The **scope** of the jobholder's discretion is also considered.

The definitions of 'service', 'function' and 'department' will need to be considered in the context of the organisational hierarchy and the descriptors used at its various levels, for example, a range of activities might be delivered within a single service, a number of services might make up the function, and that function might be one of a number within a department.

“ACTIVITY” in this context generally equates to the work of a single team or section delivering one of a range of activities within a service

“SERVICE” in this context generally equates to a number of teams or sections delivering a range of related activities, for example, treasury management and budget preparation might be activities within the accounting service.

“FUNCTION” in this context generally equates to a number of services relating to a professional discipline for example, accounting and audit might be services within the finance function.

“DEPARTMENT” in this context generally equates to a range of functions managed together at a strategic level within the organisation, for example, both Finance and the Legal, Regulatory & Governance Division might be among a number of functions within the Corporate Support Department.

“CORPORATE” in this context generally equates to, for example, multi-functional, multi-departmental or Council wide initiatives.

FACTOR 12 - INITIATIVE AND INDEPENDENCE

This factor considers the jobholder’s scope to exercise initiative and the extent to which they have freedom to act.

It takes into account the predominant nature and degree of supervision and guidance of the jobholder provided by instructions, procedures, practices, checks, policy, precedent, regulation, strategy and statute.

FACTOR 12 - INITIATIVE AND INDEPENDENCE

Level	Definition
1	<p>The job predominantly involves following instructions or established /routine working practices which define the tasks in detail, but some initiative is needed on a day-to-day basis to complete the tasks required.</p> <p>and; The work is subject to routine inspection, supervisory or customer checks, or close supervision.</p>
2	<p>The job predominantly involves working either:</p> <ol style="list-style-type: none"> 1. from instructions or established/routine working practices, but requires initiative to make routine decisions. <p>or</p> <ol style="list-style-type: none"> 2. within established procedures/policy guidelines. The work may involve responding independently to routine problems and situations. The jobholder requires initiative to organise own workload and decide how and when duties are to be carried out. <p>and; Problems are referred to a supervisor/ manager. Supervision and/or guidance are readily available.</p>
3	<p>The job predominantly involves working either:</p> <ol style="list-style-type: none"> 1. within established procedures/policy guidelines. The jobholder requires initiative to organise own workload and decide how and when duties are to be carried out. <p>or</p> <ol style="list-style-type: none"> 2. responding independently to predictable problems and situations. <p>and; The jobholder generally has ready access to a supervisor/ manager for operational advice and guidance on unusual or difficult problems; and has no input to the development of strategy and policy</p>

FACTOR 12 - INITIATIVE AND INDEPENDENCE

Level	Definition
4	<p>The job predominantly involves working either:</p> <ol style="list-style-type: none"> 1. within established procedures/policy guidelines to progress a limited range of activities. <p>or</p> <ol style="list-style-type: none"> 2. responding independently to unanticipated problems/situations or those that have implications for policy/procedure/practice. The jobholder exercises initiative with ready access to manager/more senior officers for professional advice and guidance on serious problems. <p>or</p> <ol style="list-style-type: none"> 3. within the framework of Council policy, statute and/or regulation, and involves using discretion and initiative over a range of activities. The work is subject overall to professional advice and managerial direction <p>and; The jobholder may have an occasional input to the development of strategy and policy</p>
5	<p>The job predominantly involves working either:</p> <ol style="list-style-type: none"> 1. within the framework of Council policy, statute and/or regulation and involves using discretion and initiative over a range of activities, with little access to more senior officers. The jobholder consults his/her manager for specific advice and direction as and when required. <p>or</p> <ol style="list-style-type: none"> 2. within the framework of Council policy, statute, and/or regulation, and involves using discretion and initiative over a broad range of activities, advice is not readily accessible <p>and; The jobholder will contribute on an on-going basis to the development of strategy and policy, and will also contribute to the implementation and monitoring of legislation, and regulation.</p>
6	<p>The job predominantly involves either:</p> <ol style="list-style-type: none"> 1. working within the framework of Council policy, statute and/or regulation, and involves using discretion and initiative over a broad range of activities, advice is not readily accessible. the work is subject to general managerial direction. <p>and; The job holder will be required to lead the development of strategy and policy and the implementation and monitoring of legislation, and regulation.</p> <p>OR</p>

FACTOR 12 - INITIATIVE AND INDEPENDENCE

Level	Definition
	<p>2. working within the framework of Council strategy, statute, and/or regulation, and involves exercising discretion and initiative over a very broad range of activities.</p> <p>and; The jobholder will contribute on an on-going basis to the development of strategy and policy, and to the implementation and monitoring of legislation, and regulation.</p> <p>or may make recommendations on strategic and policy matters at a Directorate level.</p>
7	<p>The job predominantly involves working within the framework of Council strategy, statute and/or regulation; and involves using discretion and initiative over a very broad range of activities, without recourse to others for advice.</p> <p>and; The work is subject to minimal managerial direction. The jobholder will be required to make recommendations on strategic and policy matters or current objectives at Committee or equivalent level.</p>
8	<p>The job predominantly involves working within the framework of the Council strategy, statute and/or regulation.</p> <p>and; The jobholder will be required to advise, challenge and recommend changes to broad areas of Council strategy and policy or future objectives at a multi-functional, multi-departmental or corporate level.</p>

FACTOR 13 – KNOWLEDGE

Scope of Factor

Consideration is given to the knowledge required to do the job, whether it has been acquired through further education, vocational training, on-the-job or previous experience. This does **not** refer to all of the knowledge which the individual jobholder may have, but only to the knowledge **needed** to do the specific job.

Application of the Level Definitions

The factor level definitions incorporate a number of **separate** elements of demand, which **must all** be regular features of the job in order for it to be assessed at that level. Where a definition includes a **range** of criteria for meeting the level of demand, the **majority** of the elements must be regular features of the job to justify scoring at that level. Where the job demonstrates only one or two aspects of the range of demands at a particular level, it will generally be assessed at a lower level. However, when using the paper based JE Scheme, in exceptional cases, assessment of the demands of the job at the higher level may be justified where one element of the criteria of a level demand is a very significant feature of the job.

Some factor level definitions include **alternative** criteria for meeting the demand at each level. This is indicated by use of the word 'or' between the various elements of demand. These alternatives have been provided in recognition of the variety of job demands which can be considered 'the same but different'. While the nature of the work or the tasks relevant to that factor heading may be quite different, the Scheme recognises that they are of **equivalent demand**.

The overall assessment of the level of knowledge required results from a combination of demands identified in terms of the type of knowledge, relevant qualifications and/or experience.

Nature of Knowledge

Consideration is given to the **type or nature** of the knowledge required:

"PRACTICAL" i.e. knowledge associated with actions rather than theory, for example, driving, swimming, cooking, etc.

"TECHNICAL" i.e. knowledge associated with the operation, maintenance, design and development of plant, equipment and technical infrastructure.

"SPECIALIST" i.e. knowledge of the concepts and principles of a particular discipline.

"PROCEDURAL" i.e. knowledge required to apply and/or interpret procedures in varying circumstances.

"ORGANISATIONAL" i.e. knowledge of departmental/functional/corporate strategy and/or objectives.

"CLERICAL" i.e. knowledge associated with clerical procedure and practice.

"ADMINISTRATIVE" i.e. knowledge associated with administrative policy, procedure and practice.

Literacy and Numeracy

The degree of literacy and numeracy required to do the job should be considered in a broad sense e.g. to include map reading:

“BASIC LITERACY” refers to the ability to read text, write straightforward sentences, to sign name and complete requisitions/request slips.

“BASIC NUMERACY” refers to the ability to add, subtract, multiply and divide, and to calculate fractions and percentages.

“INTERPRETATION / PREPARATION” refers to documents requiring original composition NOT the use of standard phraseology, and/or calculations involving mathematical formulae such as algebra, geometry, trigonometry and calculus.

NOTE: “Technical maps” does not refer to standard road maps

Extent of Knowledge

Consideration is also given to the **breadth and depth** of knowledge required to do the job:

“SIMILAR” tasks, for example, various methods of cooking or cleaning; typing letters, setting out tables, formatting presentations.

“DIFFERENT” tasks, for example, a number of different tasks such as driving, digging AND cable-laying; or cleaning, tidying, toileting AND running errands; or reception work, typing, filing AND switchboard operation.

A “RANGE” of related tasks, for example, combinations of tasks such as drafting correspondence, checking work AND attending meetings; OR purchasing, costing AND banking; or litter-picking, minor repairs, boiler duties AND security.

“**TASKS**” are the individual elements within a job or activity, for example:

- typing and filing are tasks within clerical activities
- digging and pruning are tasks within the activity of gardening
- ordering and invoicing are tasks within the activity of purchasing
- conveyancing and litigation are elements of legal activity
- washing and dressing are elements of a caring activity.

“OTHER JOBS” refers to separate jobs whose duties and responsibilities relate to those undertaken by the jobholder. For example, a Clerk of Works needs knowledge of HOW a painter, joiner or labourer should undertake their job in order to fulfil the responsibility/remit required as a Clerk of Works. Whereas a Secretary needs an appreciation of WHAT colleagues in other departments do, but not how those jobs are undertaken.

“ACTIVITIES” - an activity relates to the range of tasks required to complete a process such as, purchasing, cooking, gardening, recruitment, audit, maintenance etc. This relates to the jobholders understanding of the overall process rather than of the particular tasks involved.

“WIDE RANGE” refers to knowledge of related jobs within a single field or discipline

“BROAD RANGE” refers to knowledge of related jobs across a number of fields or different disciplines

Complexity

Consideration is also given to the **complexity** of the tasks involved in the job; and whether or not they are:

“RELATIVELY COMPLEX” i.e. tasks which require a number of different factors to be taken into consideration:

- cooking meals (different dishes, timing, ingredients, equipment);
- assessing claims for housing benefit (circumstances of claimant, sources of income, benefit regulations, local procedures).

Acquisition of Knowledge

Consideration is given to how the **necessary** knowledge is **acquired**:

This refers to how jobholders typically acquire the knowledge needed to do the job, which may differ from how an individual jobholder has acquired the necessary knowledge. Jobs should be assessed from the point of view of a TYPICAL jobholder, rather than on the basis of the personal achievements/background/circumstances of a particular individual to determine the minimum that would be considered essential, rather than desirable, if filling a vacant post.

"DEMONSTRATION" this includes attending "in-house" courses.

"ON OR OFF-THE-JOB" refers to vocational/further education or training. This includes both in-house and externally provided training such as, training by manufacturers or suppliers, for example, fork-lift truck certificate of competence, use of proprietary software applications, etc.

"VOCATIONAL" refers to job specific training rather than general education/learning, for example, in order to attain certificates such as City & Guilds, **SVQ's**, National Certificates, HNC **or equivalent**, achievement of skills such as LGV/HGV/PSV licence, **or** completion of apprenticeships etc

"PROFESSIONAL QUALIFICATIONS" **generally** refers to job specific qualifications /learning such as diplomas, **degrees**, **SVQ's** or equivalents, for example, CQSW (Certificate of Qualification in Social Work), CIPD (Chartered Institute of Personnel and Development), etc.

"POST-GRADUATE QUALIFICATIONS" **generally** refers to qualifications required IN ADDITION TO a relevant degree and includes the attainment of 'chartered status' or equivalent i.e. qualifications or experience WITHOUT which certain statutory or regulatory aspects of the job could NOT be undertaken.

NOTE: Qualifications attained as part of a programme of continuous professional development or for the purposes of progression through a career grading scheme demonstrate the individual's capabilities or eligibility for promotion but may not be essential to undertake the current job.

NOTE: Care needs to be taken to distinguish between qualification requirements and registration or membership of professional bodies as specified in Job Descriptions rather than in Person Specification, for example, a Solicitor must have an up to date practicing certificate if their role requires them to appear in Court but may allow it to lapse if in an advisory role, similarly in addition to a specified qualification a Home Carer must maintain their SSSC Registration if they are to continue to undertake a care role. Membership of a professional body

is an indication that an individual has a specified combination of qualification, training and experience; and in some cases, this may be a requirement of the role.

NOTE: Clarification may need to be sought from HR or the jobholder's Service/Department regarding current job specification and minimum requirements to do the job, which may differ from current recruitment criteria.

Technical or Specialist Knowledge

Refers to knowledge of all the available practices and procedures for the particular area. Specialist or technical knowledge includes understanding of the operation of associated equipment and tools, where relevant.

"THEORY" refers to knowledge of the principles of a discipline/specialism generally associated with academic study, for example, engineering, accounting, law etc.

"AN APPRECIATION" refers to knowledge required to carry out a specific area of work and refers to a broad theoretical understanding, generally associated with practical knowledge and vocational learning.

"IN-DEPTH KNOWLEDGE" refers to theoretical knowledge of the concepts and principles of a specific discipline or specialism generally associated with academic study, **or** the knowledge required to cover ALL of a given Department's practices, procedures and policies.

Where a job covers a narrow specialist area (e.g. child protection compared with social work generally; or bridge maintenance compared to civil engineering generally), but requires knowledge across the whole specialist area as essential background or context to the work, then this should be taken into account in assessing the level of knowledge required.

A "SPECIALISM" i.e. Child Care within Social Work OR Pre-Five's within Education OR Bridges within Civil Engineering

A "DISCIPLINE" i.e. Housing OR Social Work OR Education OR Engineering OR Finance etc.

"MULTI-DISCIPLINARY" - i.e. Housing AND Social Work OR HR/OD AND Finance etc.

Qualifications

This refers to the types of knowledge actually needed for the job. Where qualification levels are specified as a job requirement care should be taken to ascertain that the qualification level is a **fundamental job requirement** and that the job could not be done by a person without the MINIMUM qualification.

Specified qualifications may overstate the level of knowledge required, for instance, if they are used to restrict the number of applicants for a post. Qualifications as a measure of knowledge required for a job may also disadvantage (and indirectly discriminate against) those groups in the workforce which have had less opportunity to acquire the relevant qualifications.

Relevant qualifications and training may, however, provide an **indicator** only of the type and level of knowledge needed to perform the job duties properly. Jobholders need not necessarily hold such qualifications - they may have acquired an equivalent level of knowledge through some combination of relevant experience (work-related, or acquired through voluntary activities or general life experience) and on- or off-the-job training, for example, through full time study, day or block release. Consider also what qualifications would currently be required of new jobholders and stipulated in the job advertisement.

The qualifications cited in the following definitions are provided for **indicative** purposes only; and it should be noted that statements on equivalencies between qualifications issued by different awarding bodies may not be shared by other awarding bodies. Any other qualifications will need to be considered in terms of their locally recognised equivalencies to these examples:

"WORKING" i.e. a sufficient knowledge to undertake the different tasks of the job and operate associated powered tools and equipment, which may have been gained through on the job training, relevant experience or equivalent qualification, for example, SVQ Level 1, Standard Grades, National 4/5 OR equivalent such as a manufacturer's certificate of competence, for example, fork lift truck certificate etc

"COMPREHENSIVE" i.e. a full knowledge of all aspects of the job, including an understanding of the work of others, which may have been gained through on the job training, relevant experience or equivalent qualification, for example, SVQ Level 2, National Certificate, Highers, OR equivalent, for example, LGV/HGV/PSV licence etc

"ADVANCED" i.e. technical/specialist knowledge which may have been gained through on the job training, relevant experience or equivalent qualification, for example, SVQ Level 3, HNC, Apprenticeships OR equivalent.

"FURTHER" i.e. theoretical knowledge which may have been gained through on the job training, relevant experience or equivalent qualification, for example, SVQ Level 4, HND, general degree OR equivalent for example, a professional qualification which may be acquired without a degree etc

"EXTENSIVE" i.e. both breadth and depth of knowledge which may have been gained through on the job training, relevant experience OR equivalent qualification, for example, SVQ Level 5, Honours degree, post-graduate qualification OR equivalent.

NOTE: This will not necessarily be the PREFERRED qualifications for the job, NOR the qualifications held by the individual jobholder. The "MINIMUM LEVEL" is that equivalent level of knowledge (gained through qualification OR training OR experience) without which the job could not be competently undertaken.

NOTE: Qualifications attained as part of a programme of continuous professional development or for the purposes of progression through a career grading scheme demonstrate the individual's capabilities or eligibility for promotion but may not be essential to undertake the current job.

N.B. First Aid - this knowledge should only be taken into account when it is a specific job requirement.

Experience

The amount of time needed to become fully competent and familiar with all aspects of the job need **not** be continuous, for example, periods of experience may be accumulated on either side of a career break. Periods of relevant experience may be gained in current job or a previous related job. Account may need to be taken of the need to experience all seasons or cycles within a job.

Examples of the amount of experience required will vary according to the different routes taken to acquire the necessary knowledge, and according to the type of work undertaken:

"MINIMAL" i.e. generally (but not always) **approximately 6 months** – in practice this might vary from 1 month to 1 year

"SOME" i.e. generally (but not always) **approximately 1 year** – in practice this might vary from 6 months to 2 years

"MODERATE" i.e. generally (but not always) **approximately 2 years** – in practice this might vary from 1 to 3 years

"EXTENDED" i.e. generally (but not always) **approximately 3 years** – in practice this might vary from 2 to 4 years

"SIGNIFICANT" i.e. generally (but not always) **approximately 4 years** – in practice this might vary from 3 to 5 years

"CONSIDERABLE" i.e. generally (but not always) **approximately 5 years** – in practice this might vary from 4 to 6 years

"SUBSTANTIAL" i.e. generally (but not always) **more than 5 years** – in practice this might be as much as 7 years

"EXTENSIVE" i.e. generally (but not always) **more than 7 years** – in practice this might be as much as 10 years

The words used above are used to define the ranges of knowledge on each of the different routes, and their exact definition may vary accordingly.

Scope

The **scope** of the knowledge and understanding required by the jobholder is also considered.

The definitions of 'service', 'function' and 'department' will need to be considered in the context of the organisational hierarchy and the descriptors used at its various levels, for example, a range of activities might be delivered within a single service, a number of services might make up the function, and that function might be one of a number within a department.

"ACTIVITY" in this context generally equates to the work of a single team or section delivering one of a range of activities within a service

"SERVICE" in this context generally equates to a number of teams or sections delivering a range of related activities, for example, treasury management and budget preparation might be activities within the accounting service.

“FUNCTION” in this context generally equates to a number of services relating to a professional discipline for example, accounting and audit might be services within the finance function.

“DEPARTMENT” in this context generally equates to a range of functions managed together at a strategic level within the organisation, for example, both Finance and the Legal, Regulatory & Governance Division might be among a number of functions within the Corporate Support Department.

“CORPORATE” in this context generally equates to, for example, multi-functional, multi-departmental or Council wide initiatives.

Formal Working Groups

Contribution to working groups will be considered where these groups are **formally recognised** at Council level or established by an external body to consider a functional/professional response to change in the external environment. This refers to forthcoming or proposed initiatives/developments/legislation affecting the Council’s operation, **not** developments within the jobholder’s functional/professional area.

"INTERNAL" i.e. within the Council, for example, groups established by functions, departments or on a multi-disciplinary/corporate basis

"EXTERNAL" i.e. outwith the Council, for example, groups established by professional bodies, external agencies, COSLA, Scottish Government etc.

"CONTRIBUTING TO DEVELOPMENT" i.e. considering change from a particular perspective as a member of a team or working party, or providing comments or expert opinion on proposals, under the direction or leadership of others and without having overall responsibility for the outcome.

"PROVISION OF SPECIALIST EXPERTISE" i.e. expressing views of a Council service(s), function(s) or departments in relation to that Council’s local circumstances or experience on a particular issue

"REPRESENTING THE COUNCIL’S POSITION OR INTERESTS" i.e. having delegated authority to act on the expressed views of the full Council or the relevant service Committee

"OPERATIONAL" refers to jobs concerned with implementation of strategy, including strategic planning.

"ASSESSING OPERATIONAL IMPLICATIONS" i.e. considering proposed changes from an expert perspective to identify implementation issues.

"CO-ORDINATING AND REPORTING" i.e. co-ordinating the consideration of issues by others and reporting findings and conclusions, for example, as a lead officer or working party chair.

"STRATEGIC" refers to jobs concerned with development and prioritisation of strategic objectives.

"INITIATING AND DIRECTING" i.e. identification of potential problems/issues and overall responsibility for ensuring these are addressed.

FACTOR 13 - KNOWLEDGE

This factor considers what the jobholder predominantly needs to know to do the job.

It covers all practical, procedural, technical, specialist, policy and organisational knowledge required for the job, including knowledge of equipment and machinery, numeracy and literacy, culture and techniques, ideas, theories and concepts necessary to do the job.

It takes into account the breadth, and complexity of knowledge required, and the depth of understanding needed. It considers the **minimum** qualifications or experience which will **typically be needed** to do the job, but does not take into account qualifications specified as a recruitment criteria to fill the post. These minimum qualifications and experience will therefore **not necessarily** be those held by any individual job holder.

FACTOR 13 - KNOWLEDGE

Level	Definition
1	<p>The job requires predominantly practical knowledge of a number of similar tasks and operation of basic powered tools and/or equipment associated with those tasks.</p> <p>And/or</p> <p>Minimal previous or job-related experience will be required, but jobholders will require induction, and a demonstration of duties and on-the-job experience will be needed to become familiar with the job.</p>
2	<p>The job requires knowledge of a number of different tasks and operation of powered tools and/or equipment associated with those tasks. Jobholders will require basic literacy, numeracy and/or PC skills.</p> <p>And/or</p> <p>The predominantly working knowledge needed may be acquired through either education, vocational qualification, on or off-the-job training, or job-related experience. Jobholders will generally require minimal induction, and some working experience to become fully competent and familiar with all aspects of the job.</p>
3	<p>The job predominantly requires comprehensive knowledge of a range of related tasks some of which, singly or in combination, are relatively complex; and of the operation of tools and/or equipment associated with those tasks. Greater literacy and numeracy are required, and may include the ability to interpret technical maps and/or drawings.</p> <p>And/or</p> <p>The jobholder requires procedural knowledge of their own job, and an understanding of the work of others, acquired through either education, vocational qualification, on or off-the-job training, or job-related experience. Jobholders will generally require a</p>

FACTOR 13 - KNOWLEDGE	
Level	Definition
	moderate amount of relevant working experience to become fully competent and familiar with all aspects of the job.
4	<p>The job requires predominantly technical or specialist knowledge, including an appreciation of theory. The jobholder needs advanced knowledge acquired through either education, vocational qualification, on or off-the-job training, or job- related experience.</p> <p>And/or</p> <p>The jobholder requires knowledge of a wide range of other jobs and activities. Jobholders will generally need an extended period of relevant working experience to become fully competent and familiar with all aspects of the job.</p>
5	<p>The job requires predominantly technical, specialist and in-depth theoretical knowledge. The job holder needs further knowledge acquired through education, vocational qualification, on or off the job training or job-related experience.</p> <p>And/or</p> <p>The job requires knowledge of a broad range of jobs and organisational activities. Jobholders will generally need a significant period of relevant working experience to become fully competent and familiar with all aspects of the job.</p>
6	<p>The job requires extensive technical, specialist and/or theoretical knowledge. The jobholder needs both breadth and depth of knowledge acquired through either education, vocational qualification, on or off-the-job training, or job-related experience.</p> <p>And/or</p> <p>The jobholder will generally need a considerable period of relevant working experience to become fully competent and familiar with all aspects of the job. The jobholder may contribute to internal working parties considering the operational implications of initiatives, developments or changes in legislation.</p>
7	<p>In addition to both breadth and depth of technical, specialist and/or theoretical knowledge, the job requires a substantial period of relevant working experience in order to acquire, either:</p> <ol style="list-style-type: none"> 1. the expertise to assess the operational implications of proposed changes <p>or</p> <ol style="list-style-type: none"> 2. an in-depth understanding of initiatives, developments or legislation in the external environment in which the Council operates to contribute to formal/external working groups considering a functional/ professional response to the implementation of change <p>or</p>

FACTOR 13 - KNOWLEDGE

Level	Definition
	<p>3. to be able to provide specialist advice in a functional, professional, industry or national capacity, for example, to represent the stated position of their Authority on an ad hoc basis on external bodies considering a functional/ professional response to change.</p>
8	<p>In addition to both breadth and depth of technical, specialist and/or theoretical knowledge, the job requires an extensive period of relevant working experience and an in-depth understanding of proposed initiatives, developments or legislation in the external environment in which the Council operates, in order to either:</p> <p>1. deal with more complex operational or functional issues across a range of disciplines</p> <p>or</p> <p>2. provide specialist advice in a functional, professional, industry or national capacity, for example, to represent the stated position of their Authority on a regular basis on external bodies considering a functional/ professional response to change</p> <p>or</p> <p>3. be involved in the assessment of the potential impact/implications of proposed change at a functional, departmental or corporate level, and contribute to the co-ordination and development of the Authority's strategic response, and to ensuring its preparedness for implementation of change.</p>
9	<p>In addition to both breadth and depth of technical, specialist and/or theoretical knowledge, the job requires an extensive period of relevant working experience and an in-depth understanding of anticipated or proposed initiatives, developments or legislation in the external environment in which the Council operates.</p> <p>And;</p> <p>Jobholders will be required to assess the potential impact/implications at a functional, departmental or corporate level, and to initiate and direct the development of the Authority's strategic response, and ensure its preparedness for implementation of change.</p>

