

# Job Planning: How to understand it and make it work for you

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# Who and Why?

- **All** substantive consultants, associate specialists & specialty doctors
- Contractual requirement
- Follow agreed process
- Indicative then review after 3 months then annually

# Job Planning: Why is it important?

- It's a contractual requirement
- In your terms and conditions of service

# What should be in a job plan 1/2?

- Timetable of activities;
- Number of PAs of each type;
- Confirmation of the normal workbase;
- On-call arrangements;
- Any arrangements for acting up/down;
- List of agreed SMART objectives/ outcomes;

**Everything about your job!**

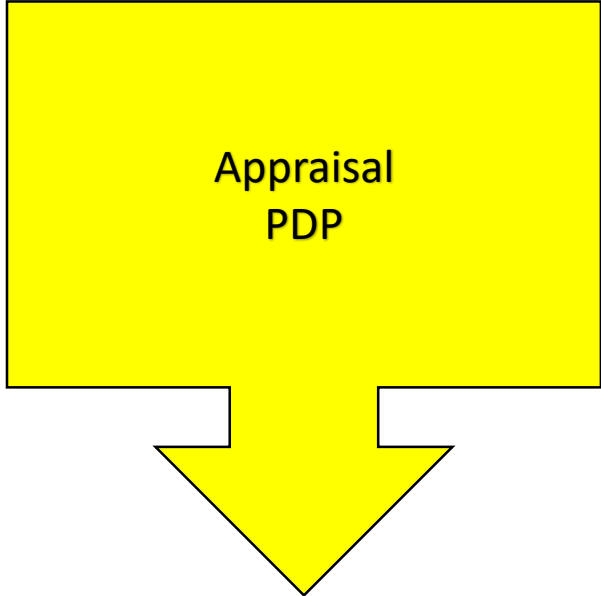
# What should be in a job plan? 2/2

- List of supporting resources;
- Description of additional responsibilities to the wider NHS;
- Arrangements for Extra/Additional PAs;
- Details of regular private work and fee-paying services;
- Accountability arrangements;
- Agreed flexible working.

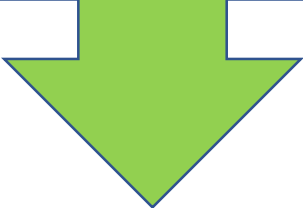
**Everything about your job!**

# Why now?

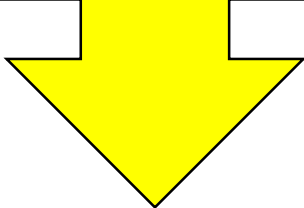
- Covid has changed everything...
- Site of work, work environment, type of work, timetable, mix
- Require a new job plan to reflect what it is agreed we should be doing now- what, where, with what backup, when?
- Job planning in theory should be done prior to changes in all of these
- We are playing catch up



Team service plan objectives



Appraisal PDP



Individual job plan review

Personal/  
Domestic/  
OH  
Issues

A large orange arrow pointing to the left, indicating that personal, domestic, or OH issues influence the individual job plan review.



# What do we (BMA) expect of the boards?

- Doctors should be supported through the process
- All should be included in service review
- All should have fit for purpose appraisal and hence develop appropriate PDP
- Job plan reviews should be regular-annual but can also be requested by either doctor or board
- Job plan meeting should be with clinical manager
- If anyone else then doctor should be asked for consent to that

# What do we expect from the employer 2/3

- An approach seeking fairness and resolution
- A joint process
- Clinical manager to have accessed training and information re agreed process
- Clinical manager present should have the authority to make decisions
- Follow the agreed (T&C) mediations, appeals process.

# What do we expect from the employer 3/3

## Team Service Planning

Identified in DL 2016/14 as integral to the process of job planning

ALL Career grades in the team should be involved

- This should be collaborative, not “done to” staff
- COVID remobilisation makes this a vital step due to ICU surge planning
- Should focus on expected demand, capacity as well as non-DCC requirements
- “Agreements” are not contractual

# What do we (BMA) expect of the individual doctor?

- Engagement with the process of appraisal and revalidation
- Preparation for review including completion of a job diary
- Honesty (probity) as per GMC
- Consideration of service objectives and their place within the team
- An approach looking for fairness and resolution

# Suggested check list for individual to prepare

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## Individual Job Planning checklist

First request a job plan review.

Before your job plan review meeting, you will need to prepare/find

	Tick when complete
Present job plan	
Completed work diary	
Action plan	
Current appraisal/PDP	
Objectives	

What do you do next?

	Tick when complete
Set a date	
Confirm who will be present (with your consent)	
Share your work diary with your clinical manager	

# Anxiety and discontent may be considerable

- We are all doing things differently to maintain patient care
- Many of us are working in ways that we may feel are not sustainable
- We need to have some joy in work
- Job plan review at this time may seem particularly threatening
- Could we consider some reassurances re longer term?
- If it really did happen annually then it wouldn't be such a big deal!

# Preparation for now

- We can offer CD/GM training
- We will offer individual refresher training
- Those doing the job plan reviews may require to be very vigilant regarding psychological aspects
- Give doctors enough warning to do diary exercise-tools? Dr diary for BMA members

# BMA Dr diary?

- Easy to customise
- Complete on your smartphone/desktop
- Easy reporting tool which summarises
- Send reports as PDF's to your clinical manager



support | protect | represent

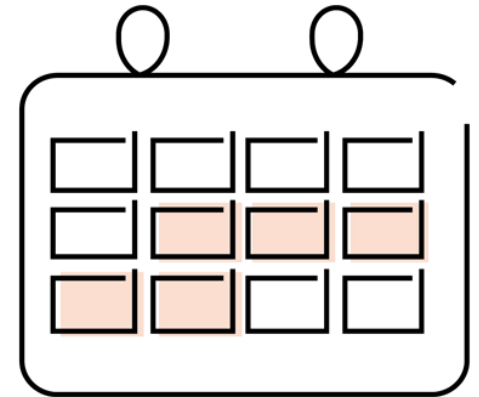
## Dr Diary App

The BMA now have a diary tool for NHS consultants, SAS doctors and medical academics to help address your job planning challenges

This is another form of evidence gathering and allows you to email a .pdf of your diary to your clinical manager

Make sure you agree beforehand that this will be the evidence you intend to use.

[bma.org.uk/pay-and-contracts/job-planning/dr-diary/dr-diary-app](https://bma.org.uk/pay-and-contracts/job-planning/dr-diary/dr-diary-app)



# Your employers

If the type of contract or the sessions you do for each category of work changes, add new details for your employer.

[+ Add an employer](#)

Employer (click to go to the diary)		Last modified date		Action	
NHS Dumfries and Galloway		08/10/2020		<a href="#">+ Add</a> <a href="#">Archive Employer</a>	
Start date	End date	PAs/week	Annualised? (y/n)	If annualised, weeks per year	Action
19/10/2018	Ongoing – no end date	3 DCC 1 SPA 1 EPAs/APAs 0.5 AR 0.5 ED	No		

[Go to your diary](#)



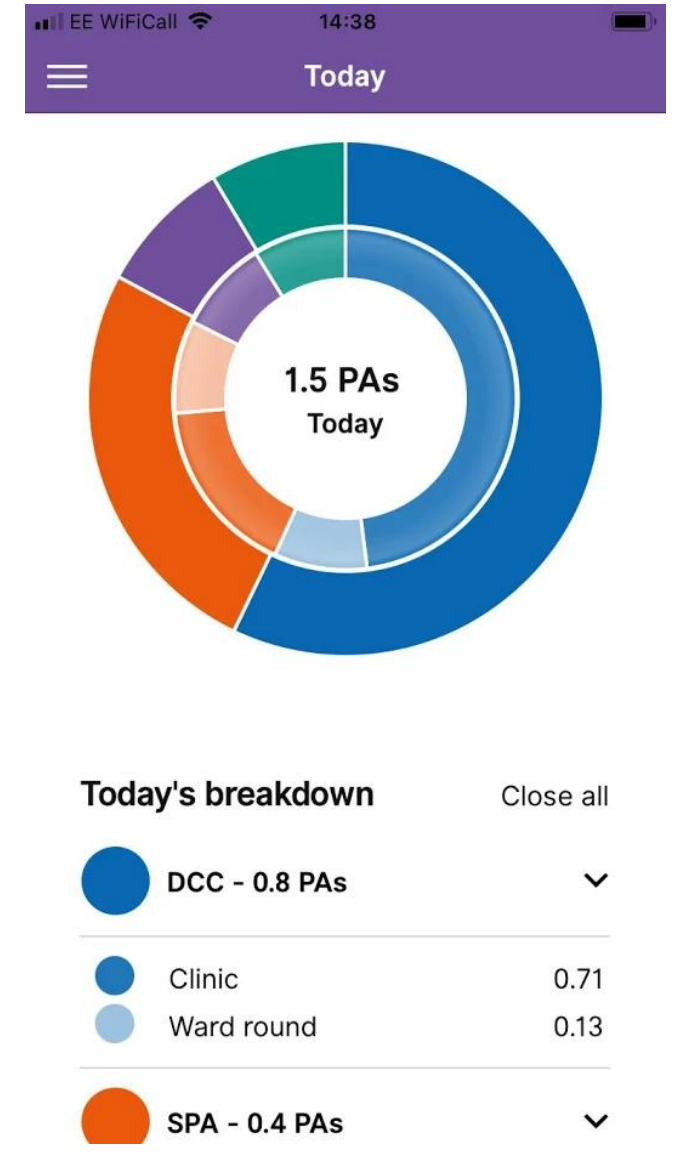
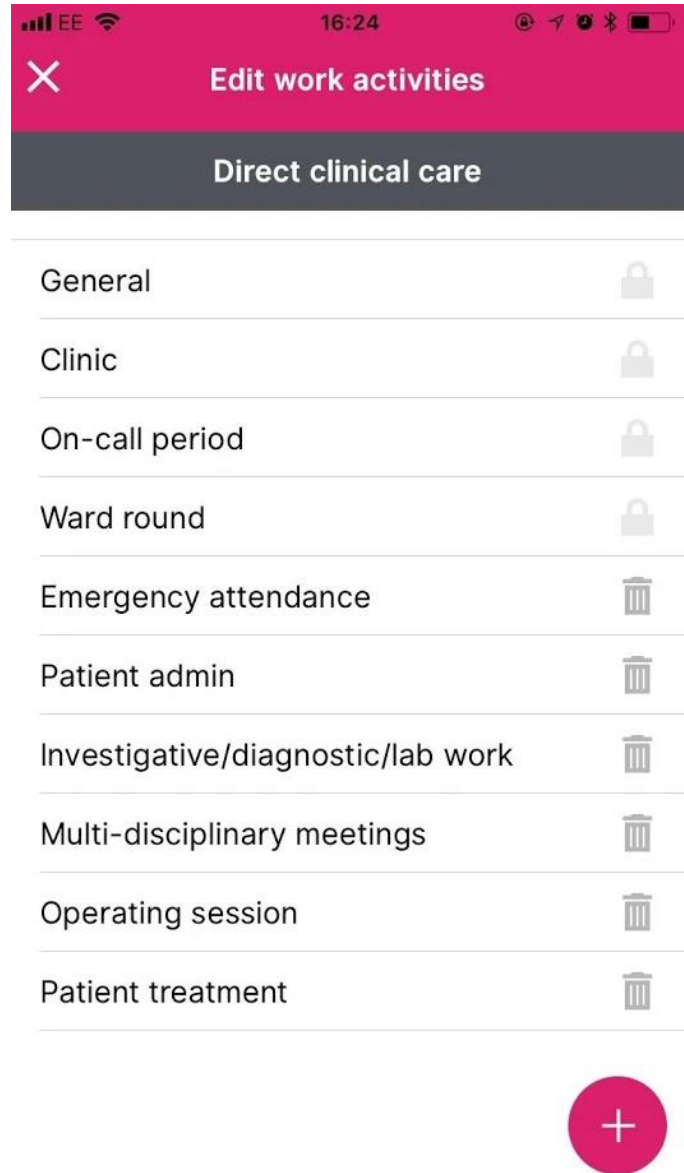
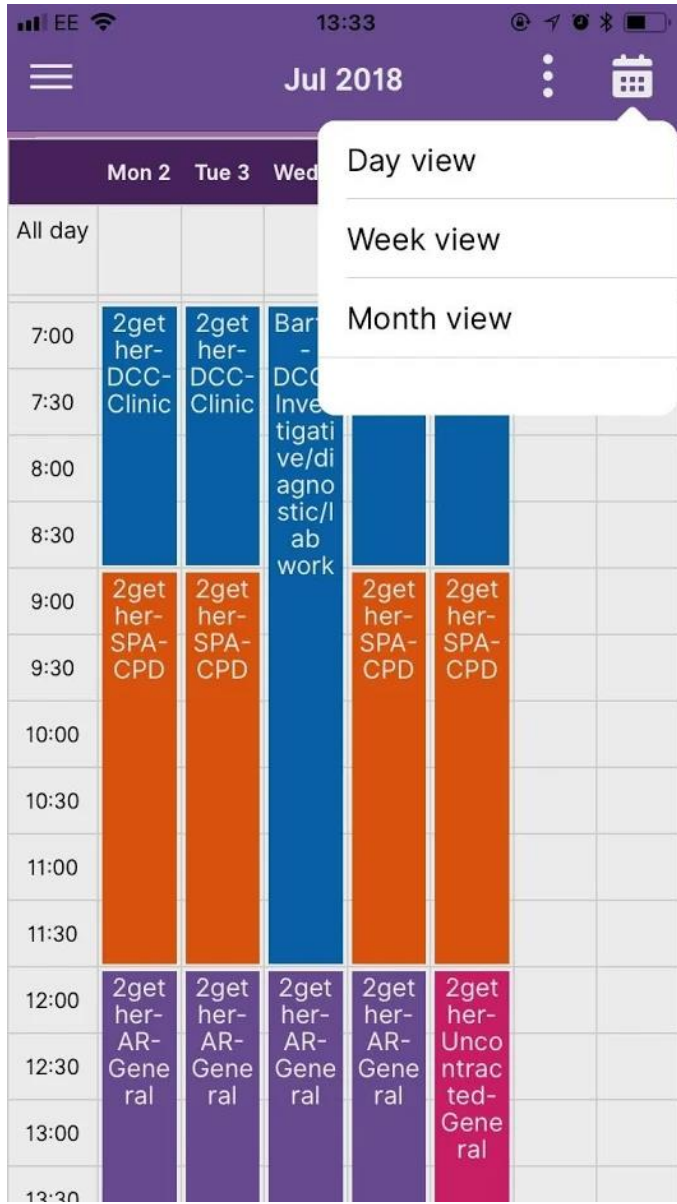
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☰ Thu 22 Oct 2020 ⋮ 📅

NHS Dumfries and Galloway ▼

All day	
7:00	
7:30	
8:00	DCC-Combined assessment admissions
8:30	
9:00	
9:30	
10:00	
10:30	
11:00	
11:30	
12:00	
12:30	
13:00	
13:30	
14:00	
14:30	
15:00	

+





## Work activities

Define the activities you carry out at work.

The list below is a starting point. You can [add categories](#) and activities (eg clinic, surgery) within each category – just click 'Add activity...'

Once created, you can start adding these to your work diary.

NB: 'Leave' will also be an option when filling in your diaries.

### Direct clinical care

General	
Clinic	
On-call period	
Ward round	
Multi-disciplinary meetings	<a href="#">Remove</a>
Patient admin	<a href="#">Remove</a>
Combined assessment admissions	<a href="#">Remove</a>
<a href="#">+ Add activity for Direct clinical care</a>	

### Supporting professional activities

General	
CPD	
Teaching	
Training	
<a href="#">+ Add activity for Supporting professional activities</a>	



## Reports

Select an employer to create a report for\*

NHS Dumfries and Galloway

Report start date\*

03/08/2020

Report end date\*

27/09/2020

Create report

Overview

Breakdown by week

On-call details

On-call by week

Weekly comparison

Key

Direct clinical care (DCC)

Additional responsibilities

Additionally remunerated/uncontracted time

Supporting professional activities (SPA)

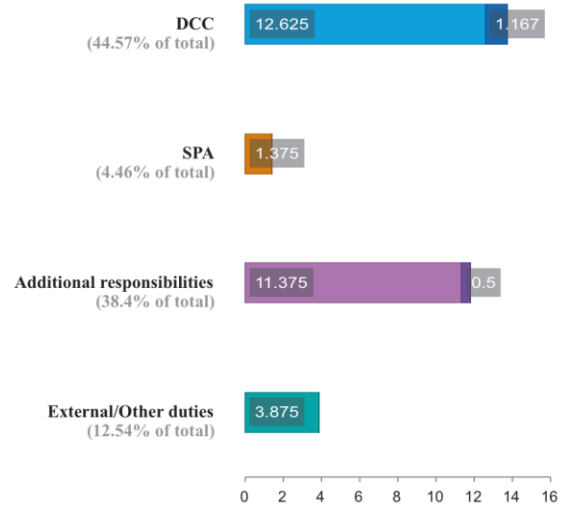
Academic work

External/Other duties

Total PAs for the period: 30.94 (100%)

Darker blocks indicate PAs at premium times.

Click on a block for more details.



Average week

The average weekly values are based on full working weeks in your diary.



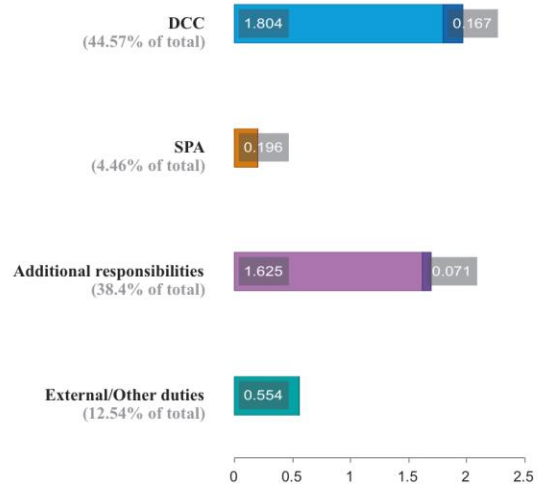
## Average week

The average weekly values are based on full working weeks in your diary. These are weeks with activities in the diary, excluding those with leave.

Average PAs per week: 4.42 (100%)

Darker blocks indicate PAs at premium times.

Click on a block for more details.



Include uncontracted time/ additionally remunerated work in report

Save report as PDF



### Key

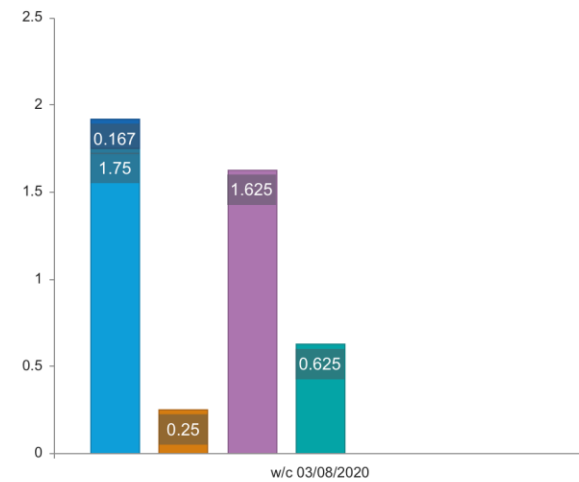
- Direct clinical care (DCC)
- Supporting professional activities (SPA)
- Additional responsibilities
- Academic work
- Additionally remunerated/uncontracted time
- External/Other duties

## Breakdown by week

Number of weeks within specified period: 8

Darker blocks indicate PAs at premium times.

Click on a block for more details; use arrows to show more weeks.



Include uncontracted time/additionally remunerated work in report

Save report as PDF



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# Tips for success

- Prepare well
- Remember this is a negotiation
- You will have to do what you agree to do so make sure you can live with that
- You might not get everything you want
- Read the guidance!



