

Substantive Job Title	Central Scheduling Officer	Pay Band	Band 5 (was reevaluated as Band 4)	Current Job Description attached	
Postholder(s)	Various				
New Job Title	Planning Team Leader	Pay Band	Band 5	New Job Description attached	
<p>Where a post within the new structure substantially remains the same (defined as matching at least 66% of the overall job purpose and key responsibilities) as a post in the old structure, an employee can be slotted into the new post provided:</p> <ul style="list-style-type: none"> • There is only one person to whom this applies or there are equal numbers of staff and posts; • The band of the post is the same. There may be instances where staff slot into a lower band with pay protection, in line with the Trust's Pay Protection Policy; and • The employee meets the essential criteria of the new person specification or are able to meet these within a reasonable and agreed period. 					
Job Requirement:	Evidence of similar duties from existing role:	Key areas not matched:			Score: <i>Fully Met -100</i> <i>Nearly Met - 75</i> <i>Partially Met -50</i> <i>Not Met- 0</i> Maximum score = 500
Qualifications & Training	Original Job: NVQ Level 3 or equivalent qualification. Working knowledge of workforce management systems and NHS administrative processes. New role: The Planning Team Leader role requires education to diploma level or equivalent and includes	The existing role includes broader leadership and developmental expectations not required in the Central Scheduling Officer role.			75

	responsibility for training staff in the use of the Trust workforce management system (GRS), supporting induction and ongoing system familiarisation.		
Knowledge & Experience	<p>Original Job Requirement: Extensive knowledge of scheduling, rostering, Working Time Regulations, Agenda for Change, and experience using systems such as GRS, ESR and Power BI.</p> <p>Evidence of similar duties from new role: The Planning Team Leader role includes significant experience in rota planning, abstraction management, compliance with Trust policies, and production and analysis of workforce data using GRS and related systems.</p>	The new role includes additional strategic planning and performance oversight responsibilities beyond the scope of the Band 4 role.	75
Nature of work and job responsibilities	<p>Original Job Requirement: Operational delivery of centralised scheduling, rota design and maintenance, compliance assurance, system training and onboarding, and analytical reporting to inform workforce decisions.</p> <p>Evidence of similar duties from new role: The Planning Team Leader role involves day-to-day coordination of rota planning, uploading and managing rotas, managing abstractions, ensuring</p>	The Planning Team Leader role includes wider leadership responsibilities and contribution to directorate-level planning, which are not required in the Central Scheduling Officer role.	75

	compliance, providing system training, producing reports, and resolving scheduling queries.		
Reporting line and line management responsibilities	<p>Original Job Requirement: No direct line management responsibility. Role operates as an individual contributor reporting to the Head of Planning.</p> <p>Evidence of similar duties from new role: The Planning Team Leader role includes direct line management responsibility for Resource Planners and acts as a senior point of contact within the team.</p>		50
Financial Resource Management	<p>Original Job Requirement: Doesn't hold a budget</p> <p>Evidence of similar duties from new role: Doesn't hold a budget</p>		100
Notes & any additional relevant information/ comments			375
The roles demonstrate a strong operational overlap, particularly in rota management, workforce management system use, compliance assurance, reporting, and staff support. The primary differences relate to the		Total Points=	Over 335 = 66%
Panel Decision			

establishment of line management and broader planning leadership responsibilities, reflecting the re-evaluation of the Central Scheduling Officer role to Band 4. Despite this, the overall job purpose and core responsibilities remain substantially similar.		Match and slot in (one individual/ equal number of individuals to available posts matches 66% of new role): No Match and limited competition (more than one individual matches 66% of new role): Yes	
Lead Manager	Greg Walsh	Date:	20.02.2026
HR Representative	Sarah Holmes & Shade Badmus	Date:	20.02.2026
Union Rep	Tony Faraway		20.02.2026

Substantive Job Title	Central Scheduling Officer	Pay Band	Band 5 (was reevaluated as Band 4)	Current Job Description attached	
Postholder(s)	Various				
New Job Title	Resource Planner	Pay Band	Band 4	New Job Description attached	
<p>Where a post within the new structure substantially remains the same (defined as matching at least 66% of the overall job purpose and key responsibilities) as a post in the old structure, an employee can be slotted into the new post provided:</p> <ul style="list-style-type: none"> • There is only one person to whom this applies or there are equal numbers of staff and posts; • The band of the post is the same. There may be instances where staff slot into a lower band with pay protection, in line with the Trust's Pay Protection Policy; and • The employee meets the essential criteria of the new person specification or are able to meet these within a reasonable and agreed period. 					
Job Requirement:	Evidence of similar duties from existing role:	Key areas not matched:			Score: <i>Fully Met -100</i> <i>Nearly Met - 75</i> <i>Partially Met -50</i> <i>Not Met- 0</i> Maximum score = 500
Qualifications & Training	Job Requirement (New Role): English and Maths at Level 2 or equivalent, with working knowledge of workforce management systems and administrative processes. Evidence of similar duties from existing role: The Central Scheduling Officer role requires equivalent educational attainment and includes	No material differences in qualification level or mandatory training requirements.			100

	<p>extensive training and system familiarisation responsibilities for staff using the workforce management system (GRS), alongside development of user guides and onboarding support.</p>		
Knowledge & Experience	<p>Job Requirement (New Role): Knowledge of workforce planning, scheduling processes, Working Time Regulations, Agenda for Change, and experience using workforce management and reporting systems.</p> <p>Evidence of similar duties from existing role: The Central Scheduling Officer role demonstrates extensive knowledge of rostering, EWTD, AfC, and use of GRS, ESR, Tiresias and Power BI to provide accurate workforce data and operational reports.</p>	<p>The CSO role includes a broader Trust-wide advisory remit, whereas the Resource Planner role is more focused on designated Operating/Business Units.</p>	75
Nature of work and job responsibilities	<p>Job Requirement (New Role): Operational delivery of rostering and scheduling, abstraction management, relief allocation, compliance monitoring, data provision to managers, and first-point-of-contact support for staff scheduling enquiries.</p> <p>Evidence of similar duties from existing role: The Central Scheduling Officer role includes rota design and maintenance, abstraction and annual leave management, relief and bank staff</p>	<p>The CSO role includes additional Trust-wide system ownership and policy rollout responsibilities not required in the Resource Planner role.</p> <p>CSO does not undertake planning.</p>	75

	administration, staff enquiry resolution, compliance assurance, and production of workforce reports to support operational decision-making.		
Reporting line and line management responsibilities	<p>Job Requirement (New Role): No formal line management responsibility; role operates under the direction of the Planning Team Leader, Band 5.</p> <p>Evidence of similar duties from existing role: The Central Scheduling Officer role has no direct line management responsibility and operates autonomously within defined parameters, providing advice and support to staff and managers. Reports to 8B.</p>		75
Financial Resource Management	<p>Job Requirement (New Role): Not a budget holder</p> <p>Evidence of similar duties from existing role: Not a budget holder</p>		100
Notes & any additional relevant information/ comments		Total Points=	425
The Central Scheduling Officer role aligns very strongly with the Resource Planner role in terms of operational scheduling, system use, compliance, abstraction management, data accuracy, and staff support. The Resource			Over 335 = 66%
Panel Decision			

Planner role represents a more locally focused application of these skills within defined Operating or Business Units, but the overall job purpose and key responsibilities remain substantially the same.		Match and slot in (one individual/ equal number of individuals to available posts matches 66% of new role): No	
		Match and limited competition (more than one individual matches 66% of new role): Yes	
Lead Manager	Greg Walsh	Date:	20.02.2026
HR Representative	Sarah Holmes & Shade Badmus	Date:	20.02.2026
Union Rep	Tony Faraway		20.02.2026

Substantive Job Title	Clinical Scheduling Officer	Pay Band	Band 5	Current Job Description attached	
Postholder(s)	Various				
New Job Title	Resource Planner	Pay Band	Band 4	New Job Description attached	
<p>Where a post within the new structure substantially remains the same (defined as matching at least 66% of the overall job purpose and key responsibilities) as a post in the old structure, an employee can be slotted into the new post provided:</p> <ul style="list-style-type: none"> • There is only one person to whom this applies or there are equal numbers of staff and posts; • The band of the post is the same. There may be instances where staff slot into a lower band with pay protection, in line with the Trust's Pay Protection Policy; and • The employee meets the essential criteria of the new person specification or are able to meet these within a reasonable and agreed period. 					
Job Requirement:	Evidence of similar duties from existing role:	Key areas not matched:			Score: <i>Fully Met -100</i> <i>Nearly Met - 75</i> <i>Partially Met -50</i> <i>Not Met- 0</i> Maximum score = 500
Qualifications & Training	Job Requirement (New Role): English and Maths at Level 2 or equivalent. Working knowledge of workforce management systems and administrative processes. Evidence of similar duties from existing role: The CSO role requires education to Level 3 or equivalent and includes extensive system use (GRS),	No material gaps. Existing role exceeds the minimum qualification and training requirements of the new role.			75

	training of scheduling staff, onboarding support, and compliance with Trust policies and procedures.		
Knowledge & Experience	<p>Job Requirement (New Role): Knowledge of rostering, workforce planning principles, Working Time Regulations, Agenda for Change, and experience using workforce management and reporting systems.</p> <p>Evidence of similar duties from existing role: The CSO role demonstrates extensive experience in clinical rostering, EWTD and AfC compliance, abstraction management, rota validation, and use of GRS and related systems to provide operational and management reports.</p>	The CSO role includes additional Trust-wide and clinical pathway scheduling responsibilities beyond the scope of the Resource Planner role.	75
Nature of work and job responsibilities	<p>Job Requirement (New Role): Operational delivery of scheduling and rostering for designated units, abstraction and relief management, first-point-of-contact support for staff enquiries, compliance monitoring, and provision of workforce data to managers.</p> <p>Evidence of similar duties from existing role: The CSO role includes rota design and maintenance, abstraction management, relief and bank staff allocation, staff enquiry handling, compliance</p>	The CSO role includes specialist and Trust-wide scheduling functions (e.g. clinical pathways, emergency response support) not required in the Resource Planner role.	75

	assurance, and production of staffing reports to inform operational decision-making.		
Reporting line and line management responsibilities	<p>Job Requirement (New Role): No formal line management responsibility; role operates under the direction of the Planning Team Leader, Band 5.</p> <p>Evidence of similar duties from existing role: The CSO role includes supervisory responsibility for Clinical Scheduling Assistants and deputising responsibilities, which exceed the requirements of the Resource Planner role.</p>	Removal of supervisory and deputising responsibilities in the new role.	50
Financial Resource Management	<p>Job Requirement (New Role): Not a budget holder</p> <p>Evidence of similar duties from existing role: Not a budget holder</p>		100
Notes & any additional relevant information/ comments			375
The Clinical Scheduling Officer role demonstrates a strong operational alignment with the Resource Planner role, particularly in rostering, abstraction management, compliance with Working Time Regulations and AfC, system		Total Points=	Over 335 = 66%
Panel Decision			

<p>expertise, and workforce data accuracy. The Resource Planner role represents a narrower, more locally focused application of these skills with reduced supervisory, clinical pathway, and Trust-wide responsibilities. Overall, the core job purpose and key responsibilities remain substantially similar.</p>		<p>Match and slot in (one individual/ equal number of individuals to available posts matches 66% of new role): No</p> <p>Match and limited competition (more than one individual matches 66% of new role): Yes</p>	
Lead Manager	Greg Walsh	Date:	20.02.2026
HR Representative	Sarah Holmes & Shade Badmus	Date:	20.02.2026
Union Rep	Tony Faraway		20.02.2026

Substantive Job Title	Clinical Scheduling Officer	Pay Band	Band 5	Current Job Description attached	
Postholder(s)	Various				
New Job Title	Planning Team Leader	Pay Band	Band 5	New Job Description attached	
<p>Where a post within the new structure substantially remains the same (defined as matching at least 66% of the overall job purpose and key responsibilities) as a post in the old structure, an employee can be slotted into the new post provided:</p> <ul style="list-style-type: none"> • There is only one person to whom this applies or there are equal numbers of staff and posts; • The band of the post is the same. There may be instances where staff slot into a lower band with pay protection, in line with the Trust's Pay Protection Policy; and • The employee meets the essential criteria of the new person specification or are able to meet these within a reasonable and agreed period. 					
Job Requirement:	Evidence of similar duties from existing role:	Key areas not matched:		Score: <i>Fully Met -100</i> <i>Nearly Met - 75</i> <i>Partially Met -50</i> <i>Not Met- 0</i> Maximum score = 500	
Qualifications & Training	<p>Job Requirement (New Role): Educated to diploma level or equivalent, with ability to support training, development and system familiarisation within the planning function.</p> <p>Evidence of similar duties from existing role: The Clinical Scheduling Officer role requires education to Level 3 or equivalent and includes</p>	Whilst the Planning Team Leader role places greater emphasis on structured staff development and cross-team training, both roles do require training experience and skills to be used		100	

	responsibility for training and mentoring Clinical Scheduling Assistants, onboarding new staff, and supporting the use of GRS and related systems.		
Knowledge & Experience	<p>Job Requirement (New Role): Experience in workforce planning, rota management, abstraction management, data analysis, and use of workforce management systems to support operational delivery.</p> <p>Evidence of similar duties from existing role: The CSO role demonstrates extensive experience in clinical rostering, EWTD and AfC compliance, abstraction management, complex rota design, use of GRS, and production of staffing reports to inform management decision-making.</p>	The Planning Team Leader role includes broader planning oversight across multiple planners and a more corporate planning perspective.	75
Nature of work and job responsibilities	<p>Job Requirement (New Role): Coordination and oversight of planning activity, rota uploads, abstraction management, system administration, performance reporting, and liaison with operational stakeholders.</p> <p>Evidence of similar duties from existing role: The CSO role is heavily focused on operational delivery of rostering, including allocation of clinical staff, management of abstractions, rota validation, balancing hours, reporting staffing risks, and supporting service continuity.</p>	The Planning Team Leader role includes responsibility for coordinating and guiding a team of planners and contributing to business planning activity, which exceeds the CSO's remit.	75

Lead Manager	Greg Walsh	Date:	20.02.2026
HR Representative	Sarah Holmes & Shade Badmus	Date:	20.02.2026
Union Rep	Tony Faraway		20.02.2026

Substantive Job Title	Clinical Scheduling Assistant – Band 3	Pay Band	Band 3 (was reevaluated as Band 2)	Current Job Description attached	
Postholder(s)	Various				
New Job Title	Resource Planner	Pay Band	Band 4	New Job Description attached	
<p>Where a post within the new structure substantially remains the same (defined as matching at least 66% of the overall job purpose and key responsibilities) as a post in the old structure, an employee can be slotted into the new post provided:</p> <ul style="list-style-type: none"> • There is only one person to whom this applies or there are equal numbers of staff and posts; • The band of the post is the same. There may be instances where staff slot into a lower band with pay protection, in line with the Trust's Pay Protection Policy; and • The employee meets the essential criteria of the new person specification or are able to meet these within a reasonable and agreed period. 					
Job Requirement:	Evidence of similar duties from existing role:	Key areas not matched:			Score: <i>Fully Met -100</i> <i>Nearly Met - 75</i> <i>Partially Met -50</i> <i>Not Met- 0</i> Maximum score = 500
Qualifications & Training	Job Requirement (New Role): English and Maths at Level 2 or equivalent. Working knowledge of workforce management systems, administrative processes, and demand/resource planning principles. Evidence of similar duties from existing role: The Clinical Scheduling Assistant role requires good				75

	general education, strong IT skills, and working knowledge of the GRS system, Trust policies, and scheduling procedures.		
Knowledge & Experience	<p>Job Requirement (New Role): Knowledge of rostering, Working Time Regulations, Agenda for Change, abstraction management, and experience providing workforce data to managers.</p> <p>Evidence of similar duties from existing role: The Clinical Scheduling Assistant role supports rostering, abstraction input, monitoring staffing levels, and use of the Trust rota system in line with policies and procedures, under supervision.</p>	<ul style="list-style-type: none"> • No requirement in the substantive role for independent workforce planning or rota design • Limited analytical and reporting responsibility <p>The Resource Planner role requires a broader understanding of workforce planning principles and greater independent judgement than evidenced in the assistant role.</p>	50
Nature of work and job responsibilities	<p>Job Requirement (New Role): Operational delivery of rostering and scheduling, abstraction and relief management, first-point-of-contact support for staff enquiries, provision of workforce data, and independent liaison with managers.</p> <p>Evidence of similar duties from existing role: The Clinical Scheduling Assistant role assists with rostering, abstractions, attendance management processes, and liaison with operational managers, working to agreed procedures and under close supervision.</p>	<ul style="list-style-type: none"> • Assistant role is explicitly supportive rather than accountable • No independent rota ownership or decision-making responsibility 	50

Reporting line and line management responsibilities	<p>Job Requirement (New Role): No formal line management responsibility; role operates under the Planning Team Leader Band 5.</p> <p>Evidence of similar duties from existing role: The Clinical Scheduling Assistant role works under supervision, with regular review and monitoring meetings, and no expectation of autonomous decision-making.</p> <p>Report to a Band 5.</p>		100
Financial Resource Management	<p>Job Requirement (New Role): Not a budget holder</p> <p>Evidence of similar duties from existing role: Not a budget holder</p>		100
Notes & any additional relevant information/ comments		<p style="text-align: right;">Total Points=</p>	<p>375 Over 335 = 66%</p>
<p>The Clinical Scheduling Assistant role is a supporting, supervised role focused on assisting with scheduling activity and maintaining data accuracy within agreed procedures. The Resource Planner role requires greater autonomy, independent judgement, analytical capability, and accountability for workforce planning decisions. While there is a clear progression pathway between the roles, the overall job purpose, level of responsibility, and scope of accountability are materially different.</p>			<p>Panel Decision</p>
Lead Manager	Greg Walsh	Date:	20.02.2026

HR Representative	Sarah Holmes & Shade Badmus	Date:	20.02.2026
Union Rep	Tony Faraway		20.02.2026

Substantive Job Title		Pay Band		Current Job Description attached	
Postholder(s)					
New Job Title		Pay Band		New Job Description attached	
<p>Where a post within the new structure substantially remains the same (defined as matching at least 66% of the overall job purpose and key responsibilities) as a post in the old structure, an employee can be slotted into the new post provided:</p> <ul style="list-style-type: none"> • There is only one person to whom this applies or there are equal numbers of staff and posts; • The band of the post is the same. There may be instances where staff slot into a lower band with pay protection, in line with the Trust's Pay Protection Policy; and • The employee meets the essential criteria of the new person specification or are able to meet these within a reasonable and agreed period. 					
Job Requirement:	Evidence of similar duties from existing role:	Key areas not matched:		Score: <i>Fully Met -100</i> <i>Nearly Met - 75</i> <i>Partially Met -50</i> <i>Not Met- 0</i> Maximum score = 500	
Qualifications & Training					
Knowledge & Experience					



JOB DESCRIPTION

1. Job Details	
Job Title:	Planning Manager
Pay Band:	Agenda for Change – Band 7
Reports to (Title):	Head of Planning
Accountable to (Title):	Divisional Director of Operations
Responsible for (Title/s):	Planning Team Leaders
Location/ Site/ Base:	On site at agreed Trust location
2. Job Purpose	
<p>The post-holder is the specialist lead for the Trust's Planning Systems (GRS), providing advanced system administration, configuration, data integrity oversight, reporting, and workflow optimisation. They will act as the Trust expert for planning systems functionality, development, analytics, and integration with associated clinical and corporate systems.</p> <p>The role will directly line manage the Planning Team Leaders and deputies for the Head of Planning.</p> <p>The role combines line management, technical system leadership, workforce analytics, and project management to ensure the Trust receives maximum operational, financial, and clinical benefit from planning systems.</p> <p>The post-holder will drive improvements in rostering quality, utilisation, demand matching, and compliance with national workforce standards (e.g., NHSI Rostering Good Practice, Electronic Rostering KPIs).</p> <p>The post holder will manage small-to-medium digital workforce projects, lead system upgrades, and ensure consistent processes, training, and governance across all business units.</p> <p>The post holder will work collaboratively with internal and external stakeholders to drive service improvements, enhance patient outcomes, and optimise resources. By applying structured project management methodologies, they will oversee the delivery of complex programmes, managing risks, dependencies, and stakeholder expectations.</p>	
3. Role of Department	
<p>The role of the Planning department within the operations directorate is to be responsible for:</p> <ul style="list-style-type: none">• Maintaining accurate records on the Trust's workforce management system for staff working hours and patterns of work.	

- Preparation, planning and allocation of staff to operational duties.
- Enabling and supporting the cost-effective and efficient delivery of operational services to our patients through good roster and management practice to meet the Trust's objectives.
- Provide support, help and guidance to staff and management teams either in-person, by telephone, email or other on-line system of communication, in all matters related to scheduling.

4. Organisation Chart



• **Duties & Responsibilities**

- Work with the Head of Planning to ensure that the Directorate Business Plan objectives are achieved.
- Directly line manage the Planning Team Leaders.
- Ensure the planning function is delivered with highest standards, of the required quality and in accordance with Statutory Regulations, Service Level Plans, specifications and trust requirements, working closely with the Operational teams, HR, Payroll, IT, Predictive Analytics and others to provide the best services to patients
- Deputies for the Head of Planning, internally and externally.
- Attend regular external system national working groups.
- Line Management, Leadership & Workforce Development
 - Provide direct line management to Planning Team Leaders, supporting delivery of agreed service objectives and operational plans.

- Set individual and team objectives aligned to Directorate Business Plans, escalating risks and issues as required.
- Conduct PADRs and interim reviews, managing performance, attendance, and wellbeing in accordance with Trust HR policies and procedures.
- Support workforce planning activities for the function, including recruitment, induction, skill-mix development, and rota cover.
- Manage routine people management issues, including sickness absence and conduct matters, with guidance from HR.
- Support the development of Team Leaders and staff through coaching, mentoring, and on-the-job development.
- Monitor staffing capacity and performance, escalating operational risks and workforce pressures to Head of Planning.
- Promote a positive, inclusive team culture that supports engagement, equality, and continuous improvement.
- Ensure staff are trained and supported to deliver safe, effective, and compliant rostering and workforce planning services.
- Act as a deputy for Head of Planning on day-to-day people management issues when required.
- System Administration & Technical Leadership
 - Act as the primary system administrator for GRS across the organisation.
 - Lead system configuration, permissions, user access, templates, rulesets, workflows, and compliance settings.
 - Manage data quality, system audits, and error resolution to maintain accurate rosters.
 - Create, test and deploy system upgrades, new modules, and enhancements according to change-control processes.
 - Maintain documentation for configuration, workflows, business rules, and data standards.
 - Troubleshoot system issues and liaise with vendors/IT to resolve complex technical queries.
 - Ensure compliance with eRostering national standards, WTR, safer staffing, and local rostering policy.
- Reporting, Forecasting & Analytics
 - Develop, maintain and automate regular reporting dashboards for executive, operational and workforce teams.
 - Produce advanced analytics including roster utilisation, shift fill rates, sickness trends, leave patterns, cost forecasts, overtime usage, and KPIs.
 - Provide specialist analysis to support operational decision-making (e.g., surge planning, seasonal pressures, rota redesign).

- Ensure datasets are accurate, consistent, and aligned with ESR, CIP reporting, activity modelling, and demand/capacity planning.
- Build SQL/BI-based reports (e.g., Power BI, SSRS) to improve visibility of performance and compliance
- Project Management & Change Leadership
 - Lead digital workforce projects, system enhancements, and cross-Trust rostering improvement initiatives.
 - Use recognised project methodologies (Agile/PRINCE2) to deliver to time, cost, and quality.
 - Oversee stakeholder engagement with business units, clinical teams, HR, finance, and operations.
 - Support the implementation of new rostering modules, mobile apps, self-service functionality, and automation.
 - Lead Trust-wide change management activities including process redesign, standardisation, and benefits realisation tracking.
- Training, Guidance & User Support
 - Deliver training programmes for new users and advanced sessions for managers, planners, and administrators.
 - Provide expert advice and coaching on rostering best practice, system functionality, and data interpretation.
 - Develop user manuals, e-learning content, and knowledge-base documentation.
 - Provide ongoing specialist support, including managing a helpdesk workflow where required.
- Governance & Compliance
 - Ensure the Trust complies with rostering governance, use of resources standards, and NHS England expectations.
 - Lead on rostering audits, assurance reporting, and compliance reviews for internal and external stakeholders.
 - Maintain strong information governance and GDPR controls around workforce data.
 - Participate in Workforce Governance Groups / eRostering Boards, providing expert insight and reports.
- Ensure that the Trust's funds are properly used, represent value for money, and can withstand public scrutiny.

Values

The Post holder will be required uphold Trust values of **Kindness, Courage and Integrity**, and to demonstrate compassionate care in their daily work and adopt the 6 Cs - NHS values essential to compassionate care: **Care, Compassion, Competence, Communication, Courage and Commitment**. Post- holders will also be required to understand and work in

accordance with the NHS constitution and put the patient at the heart of their work.

Safeguarding Children, Young People and Adults at risk of abuse and neglect

South East Coast Ambulance NHS Trust is committed to safeguarding and promoting the welfare of children, young people and adults at risk of abuse and neglect, and expects all staff and volunteers to share this commitment. All staff are required to adhere to the trust's safeguarding policy and understand their individual safeguarding responsibilities

Equality and Diversity/Equal Opportunities

The Trust recognises the need for a diverse workforce and is committed to Equal Opportunities. It seeks to eliminate unlawful discrimination against colleagues, potential employees, patients or clients on the grounds of sex, marital status, disability, sexual orientation, gender identity, age, race, ethnic or national origin, religion, pregnancy/maternity, political opinion, or trade union membership and to promote equality of opportunity and good relations between staff and clients. Individuals, including volunteers, contractors and temporary workers, must at all times indicate an acceptance of these principles and fulfil their responsibilities with regard to equality legislation and the Trust's Equality Diversity and Human Rights Policy and protocols. Similarly, all individuals have a responsibility to highlight any potentially discriminatory practice to their line manager, human resources department or trade union/professional associations, ensure that they treat everyone with respect and consideration and attend relevant mandatory training.

As a member of the Trust's management team, the post-holders is expected to take responsibility for embedding equality and diversity in their work and areas of management responsibility. This will include leading on specific E&D related work streams and ensuring that the Trust is compliant with the appropriate equality legislation.

Corporate governance:

High standards of governance are vital in healthcare organisations. Good governance sets the boundaries and structures in which we are able to function safely and provide the most effective care to our patients. We ask all employees to:

- Familiarise yourself with and apply Trust-wide and local policies, procedures and other formal instructions;
- Act within the scope of your authority and/or practice at all times. Limits of financial authority are set out in our Standing Financial Instructions;
- Undertake the statutory and mandatory training suitable to your role and maintain any relevant professional registration(s);
- Maintain accurate and timely records wherever required; and
- Notify the Trust if you identify any areas for improvement in any areas of corporate governance so that we can learn and improve.

Infection Prevention and Control

The prevention and control of infection is recognised as everyone's responsibility. All staff, bank workers, volunteers and contractors, both clinical and non-clinical are required to make every effort to maintain high standards of infection control in accordance with the Trust's Infection Prevention and Control Policy and The Health and Social Care Act 2008

Financial Management

Ensure that the Trust's funds are properly used, represent value for money and can withstand public scrutiny.

Where applicable, provide strong budget management for the defined area of management responsibility and monitor expenditure against those budgets.

Act within Standing Orders and Standing Financial Instructions of the Trust.

Health, Safety and Security

Meet Health and Safety legislation and move towards an environment where health and safety considerations are firmly embedded in the planning and decision-making processes and the 'culture' of own area of responsibility.

Promote, monitor and maintain best practice in health, safety and security

All individuals have a responsibility, under the Health and Safety at Work Act (1974) and subsequently published regulations, to ensure that the Trust's health and safety policies and procedures are complied with to maintain a safe working environment for patients, visitors and employees. All staff have a duty to protect their own health and safety and that of others persons who may be affected by their acts or omissions.

In addition, managers have specific responsibilities relating to health and safety activities including consenting to breaches; conniving to breach legislation or neglecting their duties under the legislation. Trust's objectives in accordance with the Trust's risk management strategy and policies.

Policies

The duties and responsibilities of the post will be undertaken in accordance with the policies, procedures and practices of the Trust, which may be amended from time to time.

Patient Safety is a key priority for the Trust. It is your responsibility to ensure that you are fully compliant with SECAMB policies and procedures in respect of patient safety, for example Risk Management, Infection Prevention and Control, Safeguarding children and vulnerable adults.

Confidentiality / Data Protection / Freedom of Information:

Individuals (including volunteers, contractors and temporary workers) must maintain the confidentiality of information about patients, staff and other health service business in accordance with the Data Protection Act 1998. Individuals must not, without prior permission, disclose any information regarding patients or staff. If any individual has communicated any such information to an unauthorised person that individual(s) could be liable for

disciplinary action which could result in dismissal. Moreover, the Data Protection Act 1998 also renders an individual liable for prosecution in the event of unauthorised disclosure of information.

Following the Freedom of Information Act (FOI) 2005, individuals must apply the Trust's FOI procedure.

In addition, managers have specific responsibilities to ensure that their staff maintain the confidentiality and security of all information that is dealt with in the course of performing their duties it is in accordance with the requirements of the Data Protection Act 1998 and the principles of Caldicott. Managers should also ensure that their staff are aware of their obligations under legislation such as the Freedom of Information Act 2000; Computer Misuse Act 1990, and that staff are updated with any changes or additions relevant to legislation.

Review

This document provides an outline of the main responsibilities of the post. It is not intended to be an exhaustive list of duties. Its content will be subject to regular review in conjunction with the postholder.

Date Reviewed:		
Reviewed By:	Manager:	Signature
	Postholder:	Signature:

PERSON SPECIFICATION

<i>Key: E – Essential / D – Desirable / App – Application / Int – Interview / Sce - Scenario</i>			
Area	Criteria	Essential or Desirable	Assessment method
Qualifications, Education, Accreditations	<ul style="list-style-type: none"> - Educated to degree level or equivalent. - PRINCE2/MSP Practitioner - Change management and service reconfiguration experience. - Lean and process improvement methodology. - Advanced analytical and reporting skills (Power BI, Excel, SQL or equivalent). 	E	App
	<ul style="list-style-type: none"> - MSP Qualified - Agile Project Management - Power BI report development 	D	App/Int
Experience	Management experience of producing assessments for senior management.	E	App
	Experience of working within an administrative/corporate services environment.	E	App/Int
	Analysis and interpretation of complex and varied data.	E	App
	Experience of working with PRINCE2 or similar project methodology.	D	App
	Significant NHS experience with clinical or operational background.	D	App

	Experience of facilitating multi-disciplinary groups and workshops.	D	App
Competencies (Personal qualities/ Communicating and Influencing)	Demonstrates continuous professional development.	D	App
	Ability to convey information to a range of audiences, adapting style appropriate to the circumstances.	D	App/Int
Competencies (Working with others)	Aptitude to engage in constructive collaboration with internal and external stakeholders.	E	App/Int
	Excellent customer relationship skills, self-motivated, able to work on own initiative, work well within a team and ability to communicate with staff at all levels and lead where necessary.	E	App/Int
	Able to organise own workload and keep to deadlines with excellent attention to detail.	E	App/Int
Competencies (Leadership)	Being accountable for results and actions.	E	App
	Role-modelling positive leadership behaviours.	E	App/Int
	Upholding Trust Values and role-modelling appropriate behaviours.	E	App
Competencies (Critical thinking/ improving and delivering results)	Self-motivated and able to work on own initiative.	E	App/Int
	Able to organise own workload and keep to deadlines	E	App/Int
	The ability to use data to inform decisions and take appropriate action.	D	App/Int
Other	- Current driving licence and ability to travel between sites for work purposes		

NOTE: Candidates should meet all the essential criteria if they are to be shortlisted

Date Reviewed:	
Reviewed By:	JE Team



JOB DESCRIPTION

1. Job Details	
Job Title:	Planning Team Leader
Pay Band:	Agenda for Change – Band 5
Reports to (Title):	Planning Manager
Accountable to (Title):	Head of Planning
Responsible for (Title/s):	Resource Planner
Location/ Site/ Base:	On site at agreed Trust location
2. Job Purpose	
<p>The post-holder will:</p> <ul style="list-style-type: none">• Provides day to day coordination and guidance to resource planners.• Support system administration tasks as directed, ensuring updates are actioned following appropriate authorisation.• Ensure the accurate recording of individual staff working hours and Trust policy/procedures are followed.• Manage the uploading of rotas onto the Trust's workforce management system (currently GRS) in accordance with agreed procedures.• Liaise with managers and staff to ensure that rotas are planned appropriately and compliant with Trust policy.• Manage all abstractions in line with Trust policy to optimise the number of unit hours available to patients.• Collate and analyse routine scheduling data, producing standard reports for review by senior colleagues.• Escalate variances or complex analytical issues to the Head of Planning.• Contribute to key functional areas (e.g., rota development, reporting, payroll processes) as allocated by the Head of Planning. <p>The post holder will liaise with EOC Managers, Service and Operating Unit Managers to resolve routine scheduling queries to achieves the Trust's strategic and corporate objectives. Escalate non-routine issues to the Head of Planning.</p> <p>The post holder will work under the general guidance of the Head of Planning, seeking support for non-routine or complex decisions to agreed objectives in accordance with the Trust's appraisal process. There will be regular monitoring and review meetings – objectives will be set.</p> <p>There is a requirement to promote a culture of professionalism through developing relationships with operational and corporate stakeholders.</p> <p>Support the Head of Planning in gathering information for complaint responses when required.</p> <p>The Planning Team Leader will be required to be highly flexible in their approach to</p>	

work including location, type of duties and working hours. This includes travel to other locations as required to meet the needs of the business.

The post holder will be required to carry out any task or duty commensurate with the grade of post.

The post holder will be required to produce reports and presentations on routine planning issues from a range of information source, prepare draft reports and information for senior colleagues to present.

3. Role of Department

The role of the Planning department within the operations directorate is to be responsible for:

- Maintaining accurate records on the Trust's workforce management system for staff working hours and patterns of work.
- Preparation, planning and allocation of staff to operational duties.
- Enabling and supporting the cost-effective and efficient delivery of operational services to our patients through good roster and management practice to meet the Trust's objectives.
- Provide support, help and guidance to staff and management teams either in-person, by telephone, email or other on-line system of communication, in all matters related to scheduling.

4. Organisation Chart



- **Duties & Responsibilities**

- Work with the Head Planning to ensure that the Directorate Business Plan objectives are achieved.
- Support the delivery of the planning function to required standards, of the required quality and in accordance with Statutory Regulations, Service Level Plans, specifications and trust requirements, working closely with the Operational teams, HR, Payroll, IT, Predictive Analytics and others to provide the best services to patients
- Prepare routine performance data for the Head of Planning to review, highlighting issues for senior staff to determine required actions.
- Support the induction and on-going training and development of key skills for the planning team, ensuring overall consistency in development and maintenance of new skills and adoption of new practises as directed.
- Act as a senior point of contact, supporting a positive team culture and role-modelling good practice.
- Contribute to updates of the business continuity plan as directed.
- Support the delivery of training and familiarisation support to all directorates in the correct use of the Trust workforce management system (currently GRS).
- Provide feedback to senior staff regarding system functionality of the Trust workforce management system (currently GRS).

Values

The Post holder will be required uphold Trust values of **Kindness, Courage and Integrity**, and to demonstrate compassionate care in their daily work and adopt the 6 Cs - NHS values essential to compassionate care: **Care, Compassion, Competence, Communication, Courage and Commitment**. Post- holders will also be required to understand and work in accordance with the NHS constitution and put the patient at the heart of their work.

Safeguarding Children, Young People and Adults at risk of abuse and neglect

South East Coast Ambulance NHS Trust is committed to safeguarding and promoting the welfare of children, young people and adults at risk of abuse and neglect, and expects all staff and volunteers to share this commitment. All staff are required to adhere to the trust's safeguarding policy and understand their individual safeguarding responsibilities

Equality and Diversity/Equal Opportunities

The Trust recognises the need for a diverse workforce and is committed to Equal Opportunities. It seeks to eliminate unlawful discrimination against colleagues, potential employees, patients or clients on the grounds of sex, marital status, disability, sexual orientation, gender identity, age, race, ethnic or national origin, religion, pregnancy/maternity, political opinion, or trade union membership and to promote equality of opportunity and good relations between staff and clients. Individuals, including volunteers, contractors and temporary workers, must at all times indicate an acceptance of these principles and fulfil their responsibilities with regard to equality legislation and the Trust's Equality Diversity and Human Rights Policy and protocols. Similarly, all individuals have a responsibility to highlight any potentially discriminatory practice to their line manager, human resources department or trade union/professional associations, ensure that they treat everyone with respect and consideration and attend relevant mandatory training.

As a member of the Trust's management team, the post-holders is expected to take responsibility for embedding equality and diversity in their work and areas of management responsibility. This will include leading on specific E&D related work streams and ensuring that the Trust is compliant with the appropriate equality legislation.

Corporate governance:

High standards of governance are vital in healthcare organisations. Good governance sets the boundaries and structures in which we are able to function safely and provide the most effective care to our patients. We ask all employees to:

- Familiarise yourself with and apply Trust-wide and local policies, procedures and other formal instructions;
- Act within the scope of your authority and/or practice at all times. Limits of financial authority are set out in our Standing Financial Instructions;
- Undertake the statutory and mandatory training suitable to your role and maintain any relevant professional registration(s);
- Maintain accurate and timely records wherever required; and
- Notify the Trust if you identify any areas for improvement in any areas of corporate governance so that we can learn and improve.

Infection Prevention and Control

The prevention and control of infection is recognised as everyone's responsibility. All staff, bank workers, volunteers and contractors, both clinical and non-clinical are required to make every effort to maintain high standards of infection control in accordance with the Trust's Infection Prevention and Control Policy and The Health and Social Care Act 2008

Financial Management

Ensure that the Trust's funds are properly used, represent value for money and can withstand public scrutiny.

Where applicable, provide strong budget management for the defined area of management responsibility and monitor expenditure against those budgets.

Act within Standing Orders and Standing Financial Instructions of the Trust.

Health, Safety and Security

Meet Health and Safety legislation and move towards an environment where health and safety considerations are firmly embedded in the planning and decision-making processes and the 'culture' of own area of responsibility.

Promote, monitor and maintain best practice in health, safety and security

All individuals have a responsibility, under the Health and Safety at Work Act (1974) and subsequently published regulations, to ensure that the Trust's health and safety policies and procedures are complied with to maintain a safe working environment for patients, visitors and employees. All staff have a duty to protect their own health and safety and that of others persons who

may be affected by their acts or omissions.

In addition, managers have specific responsibilities relating to health and safety activities including consenting to breaches; conniving to breach legislation or neglecting their duties under the legislation. Trust's objectives in accordance with the Trust's risk management strategy and policies.

Policies

The duties and responsibilities of the post will be undertaken in accordance with the policies, procedures and practices of the Trust, which may be amended from time to time.

Patient Safety is a key priority for the Trust. It is your responsibility to ensure that you are fully compliant with SECamb policies and procedures in respect of patient safety, for example Risk Management, Infection Prevention and Control, Safeguarding children and vulnerable adults.

Confidentiality / Data Protection / Freedom of Information:

Individuals (including volunteers, contractors and temporary workers) must maintain the confidentiality of information about patients, staff and other health service business in accordance with the Data Protection Act 1998. Individuals must not, without prior permission, disclose any information regarding patients or staff. If any individual has communicated any such information to an unauthorised person that individual(s) could be liable for disciplinary action which could result in dismissal. Moreover, the Data Protection Act 1998 also renders an individual liable for prosecution in the event of unauthorised disclosure of information.

Following the Freedom of Information Act (FOI) 2005, individuals must apply the Trust's FOI procedure.

In addition, managers have specific responsibilities to ensure that their staff maintain the confidentiality and security of all information that is dealt with in the course of performing their duties it is in accordance with the requirements of the Data Protection Act 1998 and the principles of Caldicott. Managers should also ensure that their staff are aware of their obligations under legislation such as the Freedom of Information Act 2000; Computer Misuse Act 1990, and that staff are updated with any changes or additions relevant to legislation.

Review

This document provides an outline of the main responsibilities of the post. It is not intended to be an exhaustive list of duties. Its content will be subject to regular review in conjunction with the postholder.

Date Reviewed:		
Reviewed By:	Manager:	Signature
	Postholder:	Signature:

PERSON SPECIFICATION

Key: E – Essential / D – Desirable / App – Application / Int – Interview / Sce - Scenario			
Area	Criteria	Essential or Desirable	Assessment method
Qualifications, Education, Accreditations	Educated to diploma level or equivalent.	E	App
	Change management and service reconfiguration experience. Lean and process improvement methodology.	D	App/Int
Experience	Experience producing assessments or reports for senior management.	E	App
	Experience of working within an administrative/corporate services environment.	E	App/Int
	Analysis and interpretation of complex and varied data.	E	App
	Experience of working with PRINCE2 or similar project methodology.	D	App
	5 Years NHS experience with clinical or operational background.	D	App
	Experience of facilitating multi-disciplinary groups and workshops.	D	App
Competencies (Personal qualities/ Communicating and Influencing)	Demonstrates continuous professional development.	D	App
	Ability to convey information to a range of audiences, adapting style appropriate to the circumstances.	D	App/Int
Competencies (Working with others)	Aptitude to engage in constructive collaboration with internal and external stakeholders.	E	App/Int
	Excellent customer relationship skills, self-motivated, able to work on own initiative, work well within a team and ability to communicate with staff at all levels and lead where necessary.	E	App/Int
	Able to organise own workload and keep to deadlines with excellent attention to detail.	E	App/Int
Competencies (Leadership)	Being accountable for results and actions.	E	App
	Role-modelling positive leadership behaviours.	E	App/Int
	Upholding Trust Values and role-modelling appropriate behaviours.	E	App
Competencies (Critical thinking/ improving and delivering results)	Self-motivated and able to work on own initiative.	E	App/Int
	Able to organise own workload and keep to deadlines	E	App/Int
	The ability to use data to inform decisions and take appropriate action.	D	App/Int
Other	Available to participate in an on-call rota that involves being on-site during the day, night and at weekends.	E	App/Int

NOTE: Candidates should meet all the essential criteria if they are to be shortlisted

Date Reviewed:	17.12.25
Reviewed By:	JE Team



JOB DESCRIPTION

1. Job Details	
Job Title:	Resource Planner
Pay Band:	Band 4
Reports to (Title):	Planning Team Leader
Accountable to (Title):	Planning Manager
Responsible for (Title/s):	No formal line management responsibilities
Location/ Site/ Base:	On site at agreed Trust location
2. Job Purpose	
<p>The Resource Planner role supports delivery of all services by ensuring the rostering of staff is undertaken effectively and efficiently to meet patient demand, using the trusts workforce management system to accurately track/document staff patterns of work and working hours.</p> <p>The post holder will be responsible the administration of effective and efficient resourcing of operational and non-operational staff within an agreed framework to support the delivery of safe, high-quality patient care and meeting SECamb performance standards.</p> <p>To responsibly administer all areas of scheduling for their designated Operating or Business Unit, working under the direction of the planning leadership team to a set of defined parameters in adherence with relevant Trust policies and procedures.</p> <p>Allocation of all grades of operational/clinical staff to rosters, administering abstractions and relief shifts, the application of the Working Time Regulations to ensure optimal cover for the Trust.</p> <p>The post-holder will function as first point of contact for staff providing information about planned shifts, annual leave availability, training abstractions, general enquires on matters of scheduling/planning and recording of working patterns.</p> <p>To provide oversight and assurance that rotas are prepared to the highest quality within agreed policies and procedures.</p>	
3. Role of Department	

The role of the Planning department within the operations directorate is to be responsible for:

- Maintaining accurate records on the Trust's workforce management system for staff working hours and patterns of work.
- Preparation, planning and allocation of staff to operational duties.
- Enabling and supporting the cost-effective and efficient delivery of operational services to our patients through good roster and management practice to meet the Trust's objectives.
- Provide support, help and guidance to staff and management teams either in-person, by telephone, email or other on-line system of communication, in all matters related to scheduling.

4. Organisation Chart



5. Duties & Responsibilities

- Accurately roster staff via the Trust Workforce Management System (currently GRS) to ensure the delivery of planned hours to meet the needs and demands of the patient, ensuring compliance with Working Time Regulations 1998 (WTR) and Agenda for Change (AfC) Terms & Conditions. This includes planning where there may be a need to allocate and reallocate tasks, or staff, on a daily basis to meet organisational requirements.
- Responsible for allocating resources (staff) within a designated Operational/Business Unit to agreed standards within relevant policies and

procedures and ensuring staff's welfare is being maintained by providing good/work life balance.

- Allocate relief staff equitably, optimising skill mix and contractual hours. Administer annual leave, sickness, training requests, and absences, maintaining accurate records in accordance with Trust Policies and Procedures.
- Provide a range of information to local management teams about hours worked, absence reports, resourcing (retrospectively and planned) from the Workforce Management System (GRS) and other Trust information systems (e.g. Tiresias and Power BI) as required.
- Work closely with the Operating Unit & Planning Leadership Teams to ensure scheduling of staff meets the Trust performance and budgetary objectives, while at times being required to work with minimal supervision.
- Allocation of relief staff to accommodate skill mix issues when shift planning.
- Function as a first point of contact for staff enquires related to scheduling matters or to report sickness or urgent absence requests, ensuring details are recorded accurately, responding promptly and professionally and advising the relevant managers accordingly.
- Ensure Bank Staff are used fairly and effectively within Trust policy and deal with queries and changes in an effective and timely manner.
- Administration of Annualised Staff hours to ensure they are correct, on-track, and in line with their individual Trust contracts, providing quarterly progress report to each individual Annualised Staff member and relevant management team.
- Maintain accurate records of Management Team availability.
- Provide information and assistance to inform decision making by management teams on implementation and design of flexible working arrangements for individual members of staff.
- Engage in the planning and design of new rota patterns, collaborating with staff and managers to find best outcomes and most effective solutions.
- Liaise with HR teams as required to ensure accurate records are maintained of staff contracted working hours.
- The post holder will, if required, implement the Emergency Roll Call Procedure.
- Undertake tasks while intermittent interruptions occur during the working day, requiring the post holder to move from one activity/tasking to another, and then back again.
- Participate fully in Performance and Development Reviews (PADRs) and one to one meetings with line manager as required.
- Attend, and present scheduling data and information, at management meetings when requested to do so.

<ul style="list-style-type: none"> The post holder will complete any other duties commensurate with their role and banding. 	
Special Conditions:	The duties and responsibilities described in this role brief may be subject to amendment in the light of the changing needs of the Trust.
<p>Values The Post holder will be required to demonstrate compassionate care in their daily work and adopt the Trust's NHS values essential to compassionate care: Courage, Integrity, and Kindness.</p> <p>Post-holders will also be required to understand and work in accordance with the NHS constitution and put the patient at the heart of their work.</p>	
<p>Safeguarding Children, Young People and Adults at risk of abuse and neglect South East Coast Ambulance NHS Trust is committed to safeguarding and promoting the welfare of children, young people and adults at risk of abuse and neglect, and expects all staff and volunteers to share this commitment. All staff are required to adhere to the trust's safeguarding policy and understand their individual safeguarding responsibilities.</p>	
<p>Equality and Diversity/Equal Opportunities The Trust recognises the need for a diverse workforce and is committed to Equal Opportunities. It seeks to eliminate unlawful discrimination against colleagues, potential employees, patients or clients on the grounds of sex, marital status, disability, sexual orientation, gender identity, age, race, ethnic or national origin, religion, pregnancy/maternity, political opinion, or trade union membership and to promote equality of opportunity and good relations between staff and clients. Individuals, including volunteers, contractors and temporary workers, must at all times indicate an acceptance of these principles and fulfil their responsibilities with regard to equality legislation and the Trust's Equality Diversity and Human Rights Policy and protocols. Similarly, all individuals have a responsibility to highlight any potentially discriminatory practice to their line manager, human resources department or trade union/professional associations, ensure that they treat everyone with respect and consideration and attend relevant mandatory training.</p>	
<p>Corporate governance: High standards of governance are vital in healthcare organisations. Good governance sets the boundaries and structures in which we are able to function safely and provide the most effective care to our patients. We ask all employees to:</p> <ul style="list-style-type: none"> Familiarise yourself with and apply Trust-wide and local policies, procedures and other formal instructions. Act within the scope of your authority and/or practice at all times. Limits of financial authority are set out in our Standing Financial Instructions. Undertake the statutory and mandatory training suitable to your role and maintain any relevant professional registration(s) Maintain accurate and timely records wherever required; and 	

- Notify the Trust if you identify any areas for improvement in any areas of corporate governance so that we can learn and improve.

Infection Prevention and Control

The prevention and control of infection is recognised as everyone's responsibility. All staff, bank workers, volunteers and contractors, both clinical and non-clinical are required to make every effort to maintain high standards of infection control in accordance with the Trust's Infection Prevention and Control Policy and The Health and Social Care Act 2008.

Financial Management

Ensure that the Trust's funds are properly used, represent value for money and can withstand public scrutiny.

Where applicable, provide strong budget management for the defined area of management responsibility and monitor expenditure against those budgets.

Act within Standing Orders and Standing Financial Instructions of the Trust.

Health, Safety and Security

Meet Health and Safety legislation and move towards an environment where health and safety considerations are firmly embedded in the planning and decision making processes and the 'culture' of own area of responsibility.

Promote, monitor and maintain best practice in health, safety and security

All individuals have a responsibility, under the Health and Safety at Work Act (1974) and subsequently published regulations, to ensure that the Trust's health and safety policies and procedures are complied with to maintain a safe working environment for patients, visitors and employees. All staff have a duty to protect their own health and safety and that of others persons who may be affected by their acts or omissions.

In addition, managers have specific responsibilities relating to health and safety activities including consenting to breaches; conniving to breach legislation or neglecting their duties under the legislation. Trust's objectives in accordance with the Trust's risk management strategy and policies.

Policies

The duties and responsibilities of the post will be undertaken in accordance with the policies, procedures and practices of the Trust, which may be amended from time to time.

Patient Safety is a key priority for the Trust. It is your responsibility to ensure that you are fully compliant with SECamb policies and procedures in respect of patient safety, for example Risk Management, Infection Prevention and Control, Safeguarding children and vulnerable adults.

Confidentiality / Data Protection / Freedom of Information:

Individuals (including volunteers, contractors and temporary workers) must maintain the confidentiality of information about patients, staff and other health service business in

accordance with the Data Protection Act 1998. Individuals must not, without prior permission, disclose any information regarding patients or staff. If any individual has communicated any such information to an unauthorised person that individual(s) could be liable for disciplinary action which could result in dismissal. Moreover, the Data Protection Act 1998 also renders an individual liable for prosecution in the event of unauthorised disclosure of information.

Following the Freedom of Information Act (FOI) 2005, individuals must apply the Trust's FOI procedure.

In addition, managers have specific responsibilities to ensure that their staff maintain the confidentiality and security of all information that is dealt with in the course of performing their duties it is in accordance with the requirements of the Data Protection Act 1998 and the principles of Caldicott. Managers should also ensure that their staff are aware of their obligations under legislation such as the Freedom of Information Act 2000; Computer Misuse Act 1990, and that staff are updated with any changes or additions relevant to legislation.

Review

This document provides an outline of the main responsibilities of the post. It is not intended to be an exhaustive list of duties. Its content will be subject to regular review in conjunction with the postholder.

Date Reviewed:		
Reviewed By:	Manager:	Signature
	Postholder:	Signature:

PERSON SPECIFICATION

Factors	Essential	Desirable	Assessment
	<i>The essential criteria are those which the role cannot operate without.</i>		<ul style="list-style-type: none"> • Application Form (App) • Interview (I) • Assessment (Ass)
Qualifications/ Training What should the candidate have already attained?	English and Maths at level 2 and or equivalent NVQ level qualification.	Further education qualifications such as diplomas etc	Application form
Knowledge What particular knowledge should the candidate already have?	Working knowledge of Microsoft Office suite of products. Knowledge of administrative and budgetary processes. Good understanding of demand/resource planning principles.	Knowledge of scheduling processes in the ambulance service context. Knowledge of NHS Agenda for Change and Working time Regulations	Application form Interview

Experience What previous type of experience should the candidate have?	Experience of team working environment and ability to work with others towards shared goals. Ability to work to a deadline, defining and delivering against key objectives.	Experience of working with staff and managers at all levels within an organisation. Experience of working with workforce management systems.	Application form Interview
Skills What particular skills should the candidate already have?	Good written, verbal and non-verbal communication, inter-personal and organisational skills, with the ability to work unsupervised at times and problem solve when required.	Ability to use relevant software in support of efficient reporting.	Application form Interview
Personal Qualities	Ability to work well under pressure and good time management. Team player with positive working ethos. Mature outlook, confident and flexible in approach to work. Commitment to own personal development.		Application form Interview
Other		Willingness to travel across the region if required.	Interview

NOTE: Candidates should meet all the essential criteria if they are to be shortlisted

Date Reviewed:	17.12.25
Reviewed By:	JE Team

Substantive Job Title	111 Roster Analyst/Scheduler	Pay Band	Band 5	Current Job Description attached	
Postholder(s)	Various				
New Job Title	Planning Team Leader	Pay Band	Band 5	New Job Description attached	
<p>Where a post within the new structure substantially remains the same (defined as matching at least 66% of the overall job purpose and key responsibilities) as a post in the old structure, an employee can be slotted into the new post provided:</p> <ul style="list-style-type: none"> • There is only one person to whom this applies or there are equal numbers of staff and posts; • The band of the post is the same. There may be instances where staff slot into a lower band with pay protection, in line with the Trust's Pay Protection Policy; and • The employee meets the essential criteria of the new person specification or are able to meet these within a reasonable and agreed period. 					
Job Requirement:	Evidence of similar duties from existing role:	Key areas not matched:		Score: <i>Fully Met -100</i> <i>Nearly Met - 75</i> <i>Partially Met -50</i> <i>Not Met- 0</i> Maximum score = 500	
Qualifications & Training	Job Requirement (New Role): Educated to diploma level or equivalent. No requirement for specialist clinical, contact-centre, or service-specific qualifications. Evidence of similar duties from existing role: The 111 Roster Analyst / Scheduler role requires a good general education to GCSE/A-Level standard or	Whilst the existing role requires GCSE as its minimum qualification, the significant on the job training is sufficient (under job evaluation principles) for there to be parity between these roles		75	

	above and includes significant on-the-job training in rostering systems, data analysis, and service-specific scheduling processes.		
Knowledge & Experience	<p>Job Requirement (New Role): Experience in workforce planning, rota management, abstraction handling, reporting, and use of workforce management systems to support operational delivery.</p> <p>Evidence of similar duties from existing role: The Roster Analyst role demonstrates extensive experience in manpower planning, rota compilation, staffing analysis, abstraction management, SLA monitoring, risk escalation, and use of GRS and related systems to meet service demand.</p>		100
Nature of work and job responsibilities	<p>Job Requirement (New Role): Day-to-day coordination of planners, rota uploads, abstraction management, system support, routine reporting, and liaison with operational stakeholders.</p> <p>Evidence of similar duties from existing role: The Roster Analyst role includes rota compilation, real-time staffing adjustments, abstraction and absence management, escalation of staffing risks, preparation and presentation of staffing reports, and close liaison with senior operational managers.</p>	<p>The Planning Team Leader role includes responsibility for coordinating and guiding a team of planners, whereas the Roster Analyst role focuses on individual analytical and scheduling delivery.</p> <p>The Roster Analyst role is specific to the 111/IUC contact-centre environment, whereas the Planning Team Leader role applies more broadly across operational planning functions.</p>	75
Reporting line and line management responsibilities	<p>Job Requirement (New Role): Line management responsibility for Resource Planners</p>	No direct line management or formal staff supervision responsibilities in the substantive role.	50

	<p>Band 4, acting as a senior point of contact and role-modelling good practice.</p> <p>Report to a Band 7</p> <p>Evidence of similar duties from existing role: The Roster Analyst role does not hold formal line management responsibility but does support senior leaders, provide expert advice, and influence staffing decisions through data and analysis.</p> <p>Report to a Band 7</p>		
<p>Financial Resource Management</p>	<p>Job Requirement (New Role): Not a budget holder</p> <p>Evidence of similar duties from existing role: Not a budget holder</p>		100
<p>Notes & any additional relevant information/ comments</p>		<p style="text-align: right;">Total Points= 400</p>	
<p>The 111 Roster Analyst / Scheduler role shows strong alignment with the Planning Team Leader role in terms of workforce planning, rota management, abstraction handling, system expertise, and analytical reporting. The primary difference relates to the Planning Team Leader's explicit leadership and coordination responsibility for a team of planners, which is not present in the Roster Analyst role. Overall, the core job purpose and key responsibilities remain substantially similar.</p>		<p style="text-align: right;">Over 335 = 66%</p> <p style="text-align: center;">Panel Decision</p> <p>Match and slot in (one individual/ equal number of individuals to available posts matches 66% of new role): No</p> <p>Match and limited competition (more than one individual matches 66% of new role): Yes</p>	

Lead Manager	Greg Walsh	Date:	20.02.2026
HR Representative	Sarah Holmes & Shade Badmus	Date:	20.02.2026
Union Rep	Tony Faraway		20.02.2026

Substantive Job Title	111 Roster Analyst/Scheduler	Pay Band	Band 5	Current Job Description attached	
Postholder(s)	Various				
New Job Title	Resource Planner	Pay Band	Band 4	New Job Description attached	
<p>Where a post within the new structure substantially remains the same (defined as matching at least 66% of the overall job purpose and key responsibilities) as a post in the old structure, an employee can be slotted into the new post provided:</p> <ul style="list-style-type: none"> • There is only one person to whom this applies or there are equal numbers of staff and posts; • The band of the post is the same. There may be instances where staff slot into a lower band with pay protection, in line with the Trust's Pay Protection Policy; and • The employee meets the essential criteria of the new person specification or are able to meet these within a reasonable and agreed period. 					
Job Requirement:	Evidence of similar duties from existing role:	Key areas not matched:			Score: <i>Fully Met -100</i> <i>Nearly Met - 75</i> <i>Partially Met -50</i> <i>Not Met- 0</i> Maximum score = 500
Qualifications & Training	Job Requirement (New Role): English and Maths at Level 2 or equivalent. Working knowledge of workforce management systems and administrative processes.	No material gaps. Existing role exceeds the minimum qualification requirement of the new role.			100

	<p>Evidence of similar duties from existing role: The 111 Roster Analyst role requires a good general education to GCSE/A-Level standard or above and extensive on-the-job training in workforce planning systems (GRS), data analysis, and scheduling processes.</p>		
<p>Knowledge & Experience</p>	<p>Job Requirement (New Role): Knowledge of workforce planning principles, scheduling, Working Time Regulations, Agenda for Change, and experience using workforce management and reporting systems.</p> <p>Evidence of similar duties from existing role: The 111 Roster Analyst role demonstrates extensive experience in manpower planning, rota compilation, abstraction management, SLA monitoring, safe staffing escalation, and use of GRS and related systems to meet service demand.</p>		100
<p>Nature of work and job responsibilities</p>	<p>Job Requirement (New Role): Operational delivery of rostering and scheduling, abstraction management, relief allocation, first-point-of-contact support for staff enquiries, compliance monitoring, and provision of workforce data to managers.</p> <p>Evidence of similar duties from existing role: The 111 Roster Analyst role includes rota compilation, real-time staffing adjustments, abstraction and absence management, staff enquiry</p>	<p>The Roster Analyst role includes additional analytical depth and service-specific workforce modelling beyond the narrower operational focus of the Resource Planner role.</p> <p>The Roster Analyst role is specific to the 111/IUC contact-centre environment, whereas the Resource Planner role applies across wider operational and business units.</p>	75

	handling, escalation of staffing risks, training coordination, and preparation of workforce reports.		
Reporting line and line management responsibilities	<p>Job Requirement (New Role): No formal line management responsibility; role operates under the direction of the Planning Team Leader, Band 5.</p> <p>Evidence of similar duties from existing role: The 111 Roster Analyst role does not hold formal line management responsibility and works to agreed objectives under senior operational oversight – Band 7.</p>		75
Financial Resource Management	<p>Job Requirement (New Role): Not a budget holder</p> <p>Evidence of similar duties from existing role: Not a budget holder</p>		100
Notes & any additional relevant information/ comments			450
The 111 Roster Analyst / Scheduler role aligns strongly with the Resource Planner role in terms of operational scheduling, abstraction management, system expertise, compliance with Working Time Regulations and Agenda for		Total Points=	Over 335 = 66%
Panel Decision			

Change, and workforce data accuracy. The Resource Planner role represents a narrower, more locally focused application of these skills with reduced analytical breadth and service-specific complexity. Overall, the core job purpose and key responsibilities remain substantially similar.		Match and slot in (one individual/ equal number of individuals to available posts matches 66% of new role): No	
		Match and limited competition (more than one individual matches 66% of new role): Yes	
Lead Manager	Greg Walsh	Date:	20.02.2026
HR Representative	Sarah Holmes & Shade Badmus	Date:	20.02.2026
Union Rep	Tony Faraway		20.02.2026

Substantive Job Title	USH Coordinator	Pay Band	Band 6	Current Job Description attached	
Postholder(s)	Tracy Mitchell				
New Job Title	Planning Team Leader	Pay Band	Band 5	New Job Description attached	
<p>Where a post within the new structure substantially remains the same (defined as matching at least 66% of the overall job purpose and key responsibilities) as a post in the old structure, an employee can be slotted into the new post provided:</p> <ul style="list-style-type: none"> • There is only one person to whom this applies or there are equal numbers of staff and posts; • The band of the post is the same. There may be instances where staff slot into a lower band with pay protection, in line with the Trust's Pay Protection Policy; and • The employee meets the essential criteria of the new person specification or are able to meet these within a reasonable and agreed period. 					
Job Requirement:	Evidence of similar duties from existing role:	Key areas not matched:		Score:	
				<p><i>Fully Met -100</i> <i>Nearly Met - 75</i> <i>Partially Met -50</i> <i>Not Met- 0</i> Maximum score = 500</p>	
Qualifications & Training	<p>Original Role:</p> <ul style="list-style-type: none"> • English and Maths at Level 2 or equivalent. • Educated to Level 5 (Foundation Degree) OR equivalent specialist experience. • Evidence of a training/teaching qualification. 	New role does not require a training qualification		50	

	<p>New Role: Educated to diploma level or equivalent.</p>		
<p>Knowledge & Experience</p>	<p>Original Role:</p> <ul style="list-style-type: none"> • In-depth knowledge of NHS Agenda for Change unsocial hours rules. • Working knowledge of the NHS Electronic Staff Record (ESR) • Understanding of rostering principles and scheduling processes within the ambulance sector. • Knowledge of Working Time Regulations (WTR). • Strong working knowledge of Microsoft Office and analytical tools. • Experience working with workforce management systems such as GRS. • Experience of independently resolving complex pay or roster discrepancies. • Experience in producing detailed analytical reports and presenting findings to senior staff. • Experience of working with staff and managers across all levels of an organisation. 	<p>Wording in red is not required in the Planning Team Leader role.</p> <p>Complex issues escalated in Planning TL role</p>	<p>75</p>

	<ul style="list-style-type: none"> The ability to interpret Agenda for Change terms and conditions and apply it to varied operational scenarios. <p>New Role: Analysis and interpretation of complex and varied data.</p> <p>The post holder will be required to produce reports and presentations on routine planning issues from a range of information source, prepare draft reports and information for senior colleagues to present.</p>		
<p>Nature of work and job responsibilities</p>	<p>Original Role: The Unsocial Hours Co-ordinator is responsible for providing expert advice as a subject matter specialist overseeing the administration and payment of unsocial hours in line with Agenda for Change and Trust policies, procedures and guidelines.</p> <p>The post holder acts as the Trust's specialist expert in the interpretation and application of Agenda for Change unsocial hours provisions, offering authoritative guidance to managers and staff on complex or non-standard scenarios.</p> <p>Will lead on minor service improvement initiatives relating to unsocial hour calculation process and system accuracy.</p>		50

	<p>The post holder functions as the first-line system administrator for the Workforce Management System (GRS), following standard operating instructions and ensuring the integrity of data.</p> <p>They will deliver face-to-face and virtual training to scheduling teams and managers, ensuring the effective use of the Trust's Workforce Management System for accurate recording and reporting of worked unsocial hours.</p> <p>The post holder will work independently to investigate and resolve complex unsocial hour issues, exercising specialist judgement within Trust and Agenda for Change policies.</p> <p>The role includes the analysis of complex data sets and application of Agenda for Change terms and conditions and Trust policies to ensure accurate and compliant payments for staff across the Trust.</p> <p>The post holder will identify, investigate and rectify variances in recorded data, escalating only cases that require policy interpretation beyond their specialist remit.</p> <p>They will act as the Trust's expert point of contact for all unsocial hour related queries and attend internal and external meetings to provide specialist advice.</p> <p>The post holder is responsible for communicating all variations of individual payments to the relevant internal and external payroll teams.</p>		
--	--	--	--

	<p>The policy holder will have in-depth knowledge of Agenda for Change for unsocial hours and the application of complex roster patterns.</p> <p>The policy holder will ensure Trust-wide compliance to Agenda for Change unsocial hour policy, contributing to internal audit processes and implementing corrective actions where required.</p> <p>New Role: The post-holder will:</p> <ul style="list-style-type: none">• Provides day to day coordination and guidance to resource planners.• Support system administration tasks as directed, ensuring updates are actioned following appropriate authorisation.• Ensure the accurate recording of individual staff working hours and Trust policy/procedures are followed.• Manage the uploading of rotas onto the Trust's workforce management system (currently GRS) in accordance with agreed procedures.• Liaise with managers and staff to ensure that rotas are planned appropriately and compliant with Trust policy.• Manage all absences in line with Trust policy to optimise the number of unithours available to patients.• Collate and analyse routine scheduling data, producing standard reports for review by senior colleagues.• Escalate variances or complex analytical issues to the Head of Planning.• Contribute to key functional areas (e.g., rota development, reporting, payroll processes) as allocated by the Head of		
--	--	--	--

	<p>Planning. The post holder will liaise with EOC Managers, Service and Operating Unit Managers to resolve routine scheduling queries to achieve the Trust's strategic and corporate objectives. Escalate non-routine issues to the Head of Planning. The post holder will work under the general guidance of the Head of Planning, seeking support for non-routine or complex decisions to agreed objectives in accordance with the Trust's appraisal process. There will be regular monitoring and review meetings – objectives will be set. There is a requirement to promote a culture of professionalism through developing relationships with operational and corporate stakeholders. Support the Head of Planning in gathering information for complaint responses when required. The Planning Team Leader will be required to be highly flexible in their approach to work including location, type of duties and working hours. This includes travel to other locations as required to meet the needs of the business.</p> <p>The post holder will be required to carry out any task or duty commensurate with the grade of post.</p> <p>The post holder will be required to produce reports and presentations on routine planning issues from a range of information source, prepare draft reports and information for senior colleagues to present.</p>		
<p>Reporting line and line management responsibilities</p>	<p>Original Role: Reports to 8B No line management responsibility</p>		<p>0</p>

	New Role: Report to Band 7 Line manage Band 4		
Financial Resource Management	Original Role: No budget responsibility New Role: No budget responsibility		100
Notes & any additional relevant information/ comments		Total Points=	275
			Over 335 = 66%
		Panel Decision	
		Match and slot in (one individual/ equal number of individuals to available posts matches 66% of new role): No	
		Match and limited competition (more than one individual matches 66% of new role): No	
Lead Manager	Greg Walsh	Date:	19.02.2026
HR Representative	Sarah Holmes & Shade Badmus	Date:	19.02.2026
TU Rep	Tony Faraway	Date:	19.02.2026

Substantive Job Title	Head of EOC Scheduling	Pay Band	Band 7	Current Job Description attached	
Postholder(s)	Ray Mazindu				
New Job Title	Planning Manager	Pay Band	Band 7	New Job Description attached	
<p>Where a post within the new structure substantially remains the same (defined as matching at least 66% of the overall job purpose and key responsibilities) as a post in the old structure, an employee can be slotted into the new post provided:</p> <ul style="list-style-type: none"> • There is only one person to whom this applies or there are equal numbers of staff and posts; • The band of the post is the same. There may be instances where staff slot into a lower band with pay protection, in line with the Trust's Pay Protection Policy; and • The employee meets the essential criteria of the new person specification or are able to meet these within a reasonable and agreed period. 					
Job Requirement:	Evidence of similar duties from existing role:	Key areas not matched:		Score: <i>Fully Met -100</i> <i>Nearly Met - 75</i> <i>Partially Met -50</i> <i>Not Met- 0</i> Maximum score = 500	
Qualifications & Training	<p>Original Role: The post holder is required to have specialist knowledge and practical experience acquired through a combination of in-depth experience and academic, professional or business management qualifications equating to degree level.</p> <p>Hold a recognised management qualification.</p>	<p>Old role states that the postholder should be working towards a MSc which is not specified within the original role.</p> <p>In original role Prince 2 is in desirable</p>		75	

	<p>Hold or be working towards a master's degree in management or other relevant area.</p> <p>New Role:</p> <ul style="list-style-type: none"> - Educated to degree level or equivalent. - PRINCE2/MSP Practitioner 		
<p>Knowledge & Experience</p>	<p>Original Role: Incident command as an operational or tactical commander.</p> <p>Comprehensive experience of translating strategic goals into effective and achievable plans, monitoring progress and outcomes.</p> <p>Relevant management experience.</p> <p>Relevant emergency operations centre experience.</p> <p>Experience in managing teams effectively.</p> <p>Experience and understanding of performance management.</p> <p>Experience in scheduling / planning and rota design.</p> <p>Undertakes regular audits of future planning to ensure planned hours are aligned with predicted demand and undertake historic audits to see if trends are developing in changing demand.</p> <p>Will utilise all available data sources to understand the cause behind changes in demand</p>	<p>Not required to be tactical or ops commander in the new role – However, in practice this is not a requirement or duty of the existing band 7 role</p> <p>EOC/NHS experience is a desirable within a new role</p> <p>The new role details a higher level of technical skill and expectation in relation to data and coding; however it is recognised that the old role has grown over time and that this is not reflected in the language of the older JD.</p>	<p>75</p>

and trends and ensure that issues identified are highlighted to the relevant areas to ensure mitigations or resolutions can be put in place.

New Role:

- Change management and service reconfiguration experience.
- Lean and process improvement methodology.
- Advanced analytical and reporting skills (Power BI, Excel, SQL or equivalent).
- Management experience of producing assessments for senior management.
- Experience of working within an administrative/corporate services environment.
- Analysis and interpretation of complex and varied data.
- - o Provide specialist analysis to support operational decision-making (e.g., surge planning, seasonal pressures, rota redesign).
 - o Provide expert advice and coaching on rostering best practice, system functionality, and data interpretation.

<p>Nature of work and job responsibilities</p>	<p>Original Role: Oversee a team of scheduling staff, ensuring the safe and effective scheduling of resources within the EOC. Provide assurance and reports to others around effectiveness.</p> <p>Attend EOCs as the on-call manager for incidents when called upon to do so, in order to provide EOC focussed tactical level management and communications and provide specialist advice to the strategic manager.</p> <p>Will be accountable for the effective planning of staff against forecasts taking into consideration both the art (knowledge and experience of possible impacts such as weather, events etc) and the science (known specific changes to forecasts).</p> <p>Horizon scans for future developments that may impact on scheduling of EOC staff over the course of a 1-2-year period and take appropriate action to mitigate the effects.</p> <p>Will formulate plans for up to 1-2 years in advance and ensures that all plans are adjusted to work alongside each other, avoiding conflicts and ensuring timely delivery – plans may cross boundaries with field operations and HR.</p>	<p>The job as worked has developed over time, with the original JD not demonstrating the existing level of technical skills required for the role. Management are happy that this could be evidenced through evidence of current workload.</p>	<p>75</p>
---	--	--	-----------

Undertakes regular audits of future planning to ensure planned hours are aligned with predicted demand and undertake historic audits to see if trends are developing in changing demand.

New Role:

The post-holder is the specialist lead for the Trust's Planning Systems (GRS), providing advanced system administration, configuration, data integrity oversight, reporting, and workflow optimisation. They will act as the Trust expert for planning systems functionality, development, analytics, and integration with associated clinical and corporate systems.

The role combines line management, technical system leadership, workforce analytics, and project management to ensure the Trust receives maximum operational, financial, and clinical benefit from planning systems.

The post-holder will drive improvements in rostering quality, utilisation, demand matching, and compliance with national workforce standards (e.g., NHSI Rostering Good Practice, Electronic Rostering KPIs).

The post holder will manage small-to-medium digital workforce projects, lead system upgrades, and ensure consistent processes, training, and governance across all business units.

	The post holder will work collaboratively with internal and external stakeholders to drive service improvements, enhance patient outcomes, and optimise resources. By applying structured project management methodologies, they will oversee the delivery of complex programmes, managing risks, dependencies, and stakeholder expectations.		
Reporting line and line management responsibilities	Original Role: Reports to 8C Line manages Band 5 New Role: Reports to 8B Line managers Band 5		75
Financial Resource Management	Original Role: No budget responsibility New Role: No budget responsibility		100
Notes & any additional relevant information/ comments			400
		Total Points=	Over 335 = 66%
Panel Decision			

		<p>Match and slot in (one individual/ equal number of individuals to available posts matches 66% of new role): Yes</p> <p>Match and limited competition (more than one individual matches 66% of new role): No</p>	
Lead Manager	Greg Walsh	Date:	19/02/2026
HR Representative	Sarah Holmes & Shade Badmus	Date:	19/02/2026
TU Rep	Tony Faraway	Date:	19/02/2026