**NHS NATIONAL SERVICES SCOTLAND**

# JOB DESCRIPTION

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| **1. JOB DETAILS** |
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| **Job Title:** | **HR Case Advisor**  |
| **Immediate Senior Officer/Line Manager:** | Senior HR Case Advisor  |
| **Department:****SBU:** | People Solutions & Experience(PS&E)Human Resources and Workforce Development |
| **Location:** | Edinburgh / Glasgow |
| **CAJE Reference:** |  |

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| **2. JOB PURPOSE** |
| As a member of the Policy and Case Management Team, the postholder provides a professional case and policy advisory service to customers from National Services Scotland (NSS) and Public Health Scotland (PHS), across a varied workforce policy and people management caseload and supports the Senior HR Case Advisors in the delivery of end-to-end process in more complex cases. The postholder is responsible for the provision of HR professional advice and guidance on workforce policy and people management caseload, The postholder will deal with all initial queries into the team through HR Assist, either responding on first point of contact or escalating to the Senior HR Case Advisor for allocating across the team. The postholder will provide advice and support across a range of issues, managing their own caseload including informal and initial formal stages of attendance management, conduct, grievance, capability, bullying & harassment, employment legislation, terms and conditions, and partnership working. The postholder supports in equipping managers with the relevant tools and skills through a coaching approach to manage their people better whilst ensuring compliance and minimising risk to the Boards. |

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| **3. DIMENSIONS** |
| NSS as a Non Departmental Public Body (NDPB) provides a diverse range of support functions for the NHS in Scotland and employs 3,600 clinical and non-clinical staff located in 24 sites across Scotland. Policy and Case Management is part of the NSS HR shared service provision to PHS. * The post holder will support NSS and PHS with their specific requirements in regard to policy and case management, in line with Once for Scotland and HR policies.
* The post holder will be required to coach managers, to have the skills and abilities to manage a range of HR issues and assist managers in making informed decisions with reference to HR policies, procedures, best practice and employment law.
* The postholder has no staff management or financial responsibilities.
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| **4. ORGANISATION CHART**

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| Director of HRHead of People Solutions and Experience  HR Operations Manager Recruitment Operations  Manager  Senior HR Case Advisors x 3HR Assist Team LeaderSenior Recruitment Advisor x 1Recruitment Advisors x 2 RecruitmentOfficer x 6HR Assist Advisors x1HR Case Advisors x2 HR Assist Officers x 4   |
|  Data Admin x1 |
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| **5. ROLE OF DEPARTMENT** |
| The core purpose of the HR function is to provide a range of services which will enable NHS National Services Scotland to achieve its strategic objectives and which increase the success of the organisation by improving the processes and decisions that depend on or impact people and the sustainable future of NSS. The Human Resources and Workforce Development services model operates on a tiered approach:The main activities of the HR function include the following: * The provision of core people processes, transactional and administrative HR services.
* Delivering people information, systems and the management of HR data.
* Developing tailored solutions, guidance, advice and support to managers around people, culture and performance.
* Developing solutions and expert workforce planning advice and information focused on best practice methodologies, tools and techniques.
* Providing case management service regarding to policy and redeployment, assisting the business in the implementation of policy and the mitigation of risk
* Providing resourcing and recruitment services
* An employee relations service, which encourages supports and develops partnership working arrangements and the full involvement and engagement of staff, the trade unions, and professional bodies across the organisation.
* Act as the Staff Governance Champion for NSS. Develop and implement a Staff Governance Action Plan; through the consistent and robust implementation of the standard and developing and implementing Staff Survey Action Plans.
* HR and Organisational Development consultancy, interventions and programmes focused on achieving a more agile, efficient and effective organisation
* Organisational learning and development programmes focused on the delivery of the organisations strategic objectives.
* Co-ordinating the implementation of all national pay frameworks and ensuring that these are implemented fairly and consistently across the organisation.
* Providing expert advice on all pay and grading issues along with job design, terms and conditions and employee benefits.
* Implement HR Policies that are developed and implemented in partnership that are fit for purpose and meet the needs of the organisation.

**People Solutions & Experience**People Solutions & Experience are Tier 1 of the NSS HR model, a proactive and professional HR service centre that provides managers with the tools, skills and solutions to enable effective management of their people. Tier 1 works closely with the HR centres of expertise, Healthy Working Lives, Organisational Effectiveness, People Insights, Performance & Systems and the HR Business Partners in the successful delivery of its three core services; HR Assist; Recruitment and Case Management. People Solutions & Experience is about enabling individual people solutions that meet the needs of the business in a compliance framework. It is about HR practices and processes and the way in which these are taken forward. The analysis of people issues feeds into leadership and learning interventions, guidance for managers and process simplification. People Solutions & Experience will provide managers with the tools and skills, through a coaching approach to manage people better. This will be a proactive HR service which analyses data, contacts managers in advance and asks if they need help. There are strong links to enabling managers to be compassionate leaders, making the right decisions and delivering people solutions in the right way, through a case management approach. People Solutions & Experience will include HR Assist. This is the first contact with HR, other than HR Connect, and will require highly skilled HR professional staff, able to resolve most issues at first point of contact and provide high quality professional advice and triage all calls into HR. |

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| **6. KEY RESULT AREAS** |
| 1. Deliver solutions focused policy and case management advice to managers and staff on a range of workforce policy issues such as conduct, attendance, grievance, bullying & harassment and capability, supporting the early resolution and early formal stages of the process to resolve issues in a timely manner. Working with the Senior Case Advisor to provide options and highlight associated risks at each decision point in consideration of relevant employment legislation, organisational precedent/custom and practice, considering all aspects of delivery options that are effective, people and business focused and are within the spirit of policy, terms and conditions frameworks and legislation
2. Attend early resolution and formal case hearings in support of the organisation’s managers involved in the initial stages of the relevant policy and assist in the presentation of management information/findings to the hearing panel, clarifying, where required, the HR advice provided.
3. Act as HR Representative for the nominated case management investigating team, providing solution focused advice and guidance on HR policy and process to managers appointed to formal investigations, conducted in accordance with the Workforce Policies Investigation Process.
4. Influence and support managers to work in partnership with local and regional Trade Union/ professional organisation representatives, to promote partnership working and, in cooperation with managers, achieve joint solutions to employment issues.
5. Work with Managers through a coaching approach to utilise the skills and tools required to manage their people effectively; challenging where appropriate to encourage a different thought process to ensure successful people-centred solutions for the organisation.
6. Maintaining up-to-date knowledge of policy and procedures, new legislation, national agreements on conditions of service and best practice, to ensure provision of consistent, accurate advice and good employment practice
7. Analyse and interpret Absence Trigger Reports to provide appropriate solution-based guidance to managers in the reduction and maintenance of acceptable absence levels; provide follow up advice and coaching on relevant sickness absence and ill-health policy matters to ensure that recommendations made are clearly communicated and understood.
8. Support continuous improvement by reviewing and analysing data gathered through the HR Systems and case management practice to identify and inform case issues or trends. Working with the Senior HR Case advisors to use these data insights to improve the HR policy and case management service.
9. Review policy and case documentation to ensure compliance and accuracy and reduce risk to the organisation in relation to potential Employment Tribunal claims and/or reputational detriment/damage.
10. Work with the Senior Case Advisors to create and utilise risk matrices to inform and shape management decision making in the management of cases.
11. Support HR case management clinics and ad hoc workshops on people management issues and workforce policy as required by the organisation and proactively focussing on specific people management issues to meet the needs of the service user and support managers across NSS and PHS to manage people effectively. Assist in the delivery of policy training programmes provided by other areas of HR.
12. Support the development of HR Officers in the HR Assist team by sharing knowledge and helping them to develop skills and experience in Policy and Case management.
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| **7. ASSIGNMENT AND REVIEW OF WORK** |
| The post holder will report into a Senior HR Case advisor. Work into the team is generated through various channels, generally driven by the SBUs / Directorates through the HR call logging systems, HR Director, Head of People Solutions and Experience, HR Operations Manager, Senior HR Case Advisor, and senior HR staff from the centres of expertise. Work can also be self-generated through the team identifying issues and areas for policy and case management service development.Issues arising can be problematic, requiring wide ranging knowledge of current legislation, policies and terms and conditions of service. Solutions may not be readily available and further investigation may be required to identify options, although relevant precedents may be available as a guide. The post holder is responsible for managing their workload with the Senior HR Case Advisor, and will plan work, resolve problems and make decisions on how to achieve outcomes, guided by the NSS policy and procedures framework, NHS terms and conditions of service and employment law. The post holder interprets how to effectively adopt policy and legislation and uses their own initiative to provide professional HR advice and guidance to NSS management and staff. Advice/guidance can be sought from the Senior HR Case Advisor and HR Operations Manager if required. The Centres of Expertise is also available to provide guidance. The postholder will agree their objectives and personal development plan with the Senior HR Case Advisor and will participate in a mid-year and annual performance review meeting in line with the NSS Performance Review/Appraisal process. |

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| **8. COMMUNICATIONS AND WORKING RELATIONSHIPS** |
| The postholder need to build effective relationships and communicate with a wide range of individuals and groups, internal and external to NSS, PHS and NHSScotland. The ability to influence staff at all levels, clinical and non-clinical in all parts of NSS and PHS is critical. A significant part of the role is developing strong working relationships with key stakeholders and customers from across NSS and PHS involved with individual cases to deliver a timely, effective and informed value add policy and case management service. Skills* Strong solutions focused problem solving is essential to evaluate options and risk in a changing environment to assist the business in reaching the most effective way forward in the management of cases.
* The post holder will use coaching skills in order to develop and instil confidence in manager’s application of policy, terms and conditions and legislation.
* The ability to inform and influence decisions and judgments made by Managers and to engage with colleagues from within HR to support and inform case management decisions.
* Providing advice and support to operational levels of NSS and PHS, at a range of formal meetings in line with the initial stages of the policies.
* Communication skills to articulate sensitive and contentious information in relation to policy and case management to NSS and PHS operational managers.
* Well-developed interpersonal skills to empathise and support individuals through sensitive matters whilst offering reassurance applying discretion and portraying a professional image at all times.
* Excellent presentation and communication skills, oral, verbal and written, to support the delivery of training events using range of tools and techniques to suit the needs of groups and the subject matter concerned.
* Assertiveness and persuasiveness to influence behaviour and resolve situations, especially where there is a conflict of interests. In a conflict of interest, the post holder will challenge and guide the customer’s decision making process in line with best practice model to allow compliant decisions to be made.

 **Relationships**The postholder communicates with;**Internally*** HR Director, HR Senior Management Team, Head of People Solutions & Experience, Operations Manager, Senior Policy & Case Advisor and across the People Solutions & Experience team with regards to specific case management workload and / or requirements, risk to NSS or PHS and to raise concerns highlighted through the management of cases.
* Specialist HR Advisors for advice on the application of legislation and / or policy and in the delivery of cross team project work.
* Occupational Health staff – to seek input / advice on medical issues or queries related to specific cases or wider pieces of work.
* Local and regional Trade Union Representatives / professional representatives through the management of cases and working in partnership.
* Case management note takers based in the NSS Secretariat to ensure delivery of the Secretariat service in supporting aspects of the case management process e.g. note taking.
* All levels of management within NSS and PHS when providing advice or case management support.
* Individual employees, to outline contractual rights or employment policies/procedures. There is a requirement to communicate sensitive or contentious information, e.g. defuse potentially contentious situations in relation to bullying & harassment situations face to face on an ongoing basis.
* SBU’s and Directorates within NHS NSS and PHS to ensure staffing matters are handled consistently and effectively.

**Externally*** Public Health Scotland – on all aspects of the delivery of a Policy and Case Management service as part of the NSS HR shared service provision to Public Health Scotland.
* HR staff from other Boards when involve in policy and case management work for other Boards.
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| **9. MOST CHALLENGING PART OF THE JOB** |
| The ability to identify and balance people centred solutions which are effective for the business whilst working within the principles and frameworks of HR policies, terms and conditions and processes can be challenging and requires an understanding of the business environment and the parameters which can be flexed within. Influencing managers and staff representatives in order to achieve workable solutions to ensure service delivery when there may be competing agendas and differing pressures.Working within a demand led shared service, which is liable to be unpredictable causing the post holder to move from one task to another e.g. supporting a dismissal panel to coaching line managers.Shifting the emphasis from Policy and Case Management “managing on behalf of” line managers to coaching and developing line managers so that they implement the relevant HR practice themselves. |
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| **10. Systems** |
| The post holder will have keyboard skills and ability to use a range of IT equipment and will use a range of information and operating systems:* Microsoft Office suite, for general case management correspondence, e-mails, risk matrices and excel for capturing, manipulating and reporting on data
* Call management systems e.g. Service Now for managing initial queries, communicating with individual managers, and taking forward specific pieces of work.
* Microsoft Teams for holding case management meetings and communicating with internal and external contacts, such as Managers across NSS and PHS.
* HR Management and Information systems e.g. Electronic Employee Support System (eESS), e Forms portal, Crown, Boxi, SSTS etc. – to inform aspects of policy and case management requirements
* eESS for logging and tracking case management information, and as an information source
* Crown for own management of time and attendance
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| **11. WORKING ENVIRONMENT AND EFFORT**  |
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| Physical Effort |
| * Face to face contact with staff and managers is required on a daily basis often involving a number of meetings within the day across the case workload.
* Excellent skills for accuracy in reviewing formal documents and reports and general correspondence (including outcome letters for employee conduct, employee concerns or dignity at work cases)
* The role combines periods in a busy office environment and extensive attendance at meetings, which includes, virtually and on and off-site. This can include periods where the postholder is out of the office on average 2-3 days per week before returning to their base.
* Standard Keyboard skills
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| Mental Effort |
| * Required to support formal investigations such as disciplinary, grievances, harassment and bullying and to support meetings, which can be lengthy and often dealing with sensitive cases and staff who find themselves in challenging personal circumstances.
* Required to deal with issues, which require problem solving skills and must draw from their own knowledge and experience in order to identify and recommend possible options and associated risks.
* Concentration is required when comprehending, understanding and advising on terms and conditions, policies and procedures in relation to specific queries/issues and in line with best practice and when studying or checking reports, witness statements, notes of hearing, training material, correspondence, dealing with systems issues, etc.
* The case duration can span over a prolonged period of time and the situations that the post holder deals with are mentally and at times emotionally tiring.
* Postholder deals with unpredictable workload, changes of priority and persistent and frequent interruptions via Teams, phone calls, staff and managers requesting advice or assistance through HR Contact Us (call logging system), e-mails, which can mean alternating from task to task depending on nature and importance.
* Required to support the delivery of presentations and training sessions. e.g. Case Management clinics
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| Emotional Effort |
| * Frequently required to deal with stressful, distressing and emotional situations. These would include disciplinary hearings, bullying and harassment, deaths in service and dealing with people who have challenging personal circumstances such as mental health issues and terminal illness and will need to ensure individuals are being supported appropriately.
* Exposure to staff who are upset/emotional, confrontational, angry, and who may become aggressive and may come into contact with relatives of employees in cases of ill health, mental health, death in service and substance abuse who are highly emotional. Required to advise and support accordingly through emotionally demanding and hostile situations.
* May come into contact with relatives of employees in cases of ill health, mental health, death in service and substance abuse who are highly emotional.
* Postholder at all times must deal with these issues with confidentiality and professionalism, providing support primarily to the line manager but also to the member of staff involved.
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| **12. ENVIRONMENTAL / WORKING CONDITIONS & MACHINERY AND EQUIPMENT** |
| * Required to use VDU equipment throughout the day and standard office equipment and software packages
* Deals with constant interruptions via Teams, HR Call logging queries, phone calls, e-mail and face-to-face contact with staff on a daily basis.
* The role also involves regular travelling, 3-4 times a week across Edinburgh and Glasgow sites with frequent travel required to other sites in Inverness, Aberdeen, Dundee and Lanarkshire. The biggest impact of the travelling is the reduced time in the office impacting on workload.
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| **13. QUALIFICATIONS AND/OR EXPERIENCE SPECIFIED FOR THE POST** |
| **Qualifications**:* Educated to degree level or equivalent HR experience.
* Should hold or demonstrate clear evidence of working towards Associate Member of CIPD, or equivalent

**Experience:*** Experience in providing advice and guidance to managers, enabling managers to reach effective solutions with mitigation of risks.
* Previous experience in an HR advisory post working in a medium to large organisation.
* Experience dealing with HR policy issues and able to communicate effectively with Managers at meetings, hearings and in other related situations.
* Proven experience of establishing and maintaining good working relationship with manager and colleagues
* Experience of preparing written information, reports and presenting information verbally.

**Knowledge / Skills;*** Strong communication, influencing, facilitation and coaching skills are fundamental to the role with the ability to apply a tactful and diplomatic approach when dealing with sensitive matters.
* Good problem-solving skills required when dealing with sensitive matters such as serious illness and conduct issues.
* Ability to work confidently with a wide range of people and build relationships within short timescales.
* Ability to work in a pressurised environment and deliver to tight deadlines.
* Proficiency with a range of software packages including Microsoft Word, Excel and email systems and should also have knowledge of HR systems with good keyboard skills.
* Must demonstrate the capacity to be flexible across all areas of work.
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| **14. JOB DESCRIPTION AGREEMENT** |
| A separate job description will need to be signed off by each postholder to whom the job description applies.

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| Postholder Signature: |  | Date: |  |  |

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