

Brooke Weston Trust – Job Families

Job Evaluation Questionnaire

Job title

School Business Manager

General Questions

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

Responsible for providing day-to-day management of operational services within a school, including finance, HR, site, IT, catering and administration.

What are the main tasks/duties/responsibilities of your job?

1. Responsible for financial procedures within school including processing orders, invoices, budget monitoring, monthly reconciliations in line with scheme of delegation and finance handbook. Ensuring compliance with all internal procedures.
2. Day-to-day management of operational and administrative functions of the school including HR, site, IT, catering and administration.
3. Project management responsibilities for new initiatives within the school.
4. Management of staff across service sectors – maintain records, carry out recruitment process, deal with personnel issues

% of time

Roughly, what percentage of time do you spend on each?

	Main tasks/duties/responsibilities	% of time
1	Responsible for financial procedures within school including processing orders, invoices, budget monitoring, monthly reconciliations in line with scheme of delegation and finance handbook. Ensuring compliance with all internal procedures.	40%
2	Day-to-day management of operational and administrative functions of the school including HR, site, IT, catering and administration.	30%
3	Project management responsibilities for new initiatives within the school.	20%
4	Management of staff across service sectors – maintain records, carry out recruitment process, deal with personnel issues	10%

Are there any tasks/duties which you do occasionally, or at a certain time of the year? If yes, please list and state how often you do them.

	Occasional tasks	How often you do them
1	Headcount census, workforce census	3 x per year
2	External audit	Quarterly
3	Update student records (Free School Meals)	Annually
4	Minute Meetings	2/3 times per month

1. What knowledge is needed to be able to do your job properly under the listed headings and how is the knowledge normally acquired?		
Type of knowledge	What knowledge needed and for what purpose	How normally acquired
E.g. Procedural	Processing an order for stationery	On the job instruction and experience – minimum 1 year
(1) Literacy and numeracy	Good literacy skills required for writing letters, communicating instructions to other staff via email. Good numeracy skills required for processing financial information.	GCSE level qualifications
(2) Procedural (e.g. procedures instructions for carrying out tasks)	Processing an order – from receipt of invoice through to payment and reconciliation. New employee – full HR process of adding details onto the systems, carrying out appropriate checks in accordance with policies. Detailed knowledge of management procedures, in line with BWT policies. Procurement procedures. Procedures for project management	Bookkeeping/accounting experience Experience – 3 years management experience Internal on the job training Project management qualification (i.e. PRINCE2)
(3) Equipment (e.g. machines, tools, instruments)	Basic office equipment	On the job training.
(4) Administrative systems	Good word processing skills for writing letters, writing instructions. Good excel skills for financial budgets. Ability to work on a database.	On the job training
(5) Organisational (e.g. own and other sections/departments), including arrangements and policies	Clear understanding of HR and financial policies and procedures within own school and how links to overall Trust. Implements these for other finance colleagues. Awareness and understanding of policies for other departments, such as IT, site. Good management knowledge to ensure support teams can operate effectively within school day and can appropriately guide team/colleagues.	On the job training

(6)	Specialist (e.g. finance, IT, social work), including practical, theoretical and conceptual knowledge	Specialist financial knowledge – required for effective budget management and forecasting. Specialist knowledge for project management. Knowledge of how to manage teams across different service sectors.	Basic bookkeeping qualification AAT Experience – 2 years.
(7)	Other languages and cultures	N/A	N/A
(8)	Other, please specify		

Mental Skills

This measures what analytical, problem solving and judgement skills you need to do the job. It also looks at creativity and development skills, design, handling people, developing policies and procedures and planning and strategy.

1. In the boxes below, give 2 examples of decisions or recommendations you make, or problems you solve, on a day to day, or regular, basis.

Example 1

Dealing with day to day management issues – deployment of staff, arranging cover and annual leave.

Example 2

Post holder is required to monitor staff absences and deal with these in line with the appropriate policies (for example a letter is sent to the absent member of staff if they have been off work for a particular number of days). Reference is made to HR provider if required.

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

Recommendations are made by the post holder on staffing structure based on the budget that is available. Principal may seek advice/guidance on recruiting new members of staff to cover maternity leave/sickness absence. Post holder advises on possible options, but the decision is with the Principal.

How often do you expect to take a decision or solve a problem of this type (e.g. once a month, twice a year?)

Once	times per	term
------	-----------	------

3. Do you ever have to interpret or analyse information or situations in order to make a decision or recommendation, or to solve a problem?

No	<input type="checkbox"/>	Go to the next question	Yes	<input checked="" type="checkbox"/>	Give an example in the box below:
----	--------------------------	-------------------------	-----	-------------------------------------	-----------------------------------

Example of decision / recommendation / problem:

A member of teaching staff is taking maternity leave and there is no capacity internally to fill the post.

Indicate nature and complexity of information / situation:

Post holder has to analyse the staffing budget to identify potential affordable options for an interim period. Post holder will look at supply teaching costs as well, and look at costs of maternity cover to make a recommendation to the Principal.

How do you interpret or analyse the information / situation?

Post holder identifies the required hours of work required and the length of period to cover. Post holder compares to costs of maternity pay to identify an appropriate solution. A number of different scenarios may be modelled in order to ensure there is cover for the teacher.

4.	What are the requirements of your job for creative or developmental skills (in the broadest sense e.g. designing a page layout, working out how to deal with a difficult client, drawing up a new policy or procedure?)		
Please rank the following statements according to how typically they apply to the job (1 = most typical, 2 = next most typical etc.) Leave blank any statements which do not apply.			
	The work is designed in such a way that creative and developmental skills are not necessary		
2	The work requires creative skills for solving straightforward problems		
1	The work requires creative and developmental skills for solving varied problems		
3	The work requires creative and developmental skills for solving difficult problems		
	The work requires creative and developmental skills for producing innovative solutions to major problems.		
Give an example for the option you have marked 1, as being most typical			
Month-end checks – this is a procedure put in place across all finance departments. Post holder is required to look at a number of different sources to identify where payments have been made, complete bank reconciliation etc.			
5.	Does your work require you to plan ahead or organise for the future?		
No <input type="checkbox"/>	Go to the next question		
Yes <input checked="" type="checkbox"/>	What period do these planning/organising activities mainly cover? (NB: please note the period over which planning activities take place, not the time-scale for what is planned)	Short term (days, up to weeks) <input type="checkbox"/> Medium term (months, up to a year) <input checked="" type="checkbox"/> Long term (more than a year) <input type="checkbox"/>	
Please give a typical example below:			
Budget setting, monitoring and updates are carried out throughout the year in response to any changes. Planning required for project management i.e. refurbishment of a classroom or replacement of telephone system.			
6.	Are any other forms of mental skill required for your job? If so, please list them below and explain what purposes you require them for.		
Mental Skill		Purpose required for	
The ability to multi task The ability keep focused		To retain information on a number of different areas. Maintain priorities particularly when unusual situations arise which require immediate attention.	

Interpersonal and communication skills

This factor looks at the context, complexity and nature of the subject matter to be communicated; and the context, form, process and potential difficulty of the actual interaction with the recipient(s).

1.		
Tick the boxes below to show which forms of interpersonal and communication skills are needed for your job. Say what each is used for and with whom they are used.		
Form of skill		Used for and with whom
<i>Example: Caring Skills</i>	<input checked="" type="checkbox"/>	Providing personal services to clients in their homes
<i>Example: Caring Skills</i>	<input checked="" type="checkbox"/>	Assessing client's care needs
<i>Example: Negotiating Skills</i>	<input checked="" type="checkbox"/>	Negotiating tender contract details
Caring skills	<input type="checkbox"/>	
Training skills	<input checked="" type="checkbox"/>	Training for Finance/Admin staff or other operational support staff.
Team working skills	<input checked="" type="checkbox"/>	Working with direct reports, working with other colleagues across the school
Motivational/team leading skills – includes own staff	<input checked="" type="checkbox"/>	Motivating Finance/Admin colleagues and other direct reports from support services
Advising, guiding skills	<input checked="" type="checkbox"/>	Advice to staff on HR procedures e.g. staff absence
Persuading, influencing skills	<input checked="" type="checkbox"/>	Influencing Principal on budget-related matters i.e. staffing budget
Counselling skills	<input type="checkbox"/>	
Conciliating skills	<input type="checkbox"/>	
Advocacy skills	<input checked="" type="checkbox"/>	Advocate of service sectors across the school
Negotiating skills	<input checked="" type="checkbox"/>	Negotiating with parents regarding credit control (i.e. late/non- payments), suppliers as part of procurement procedures
Oral (spoken) communication skills	<input checked="" type="checkbox"/>	Clear oral instructions to staff, students and parents
Written communication skills	<input checked="" type="checkbox"/>	Clear written instructions to staff and students (via email, letters) and report writing
Oral presentation skills	<input checked="" type="checkbox"/>	Provision of training to staff e.g. customer service, how to handle complaints
Other interpersonal or communication skills	<input type="checkbox"/>	
2.		
Are you required to use a language (oral or written) other than English?		
No	<input checked="" type="checkbox"/>	Go to the next question
Yes	<input type="checkbox"/>	Complete the table below
Language	Used to communicate with.	Used for.

--	--	--

3. Are you required to use any form of recognised sign language?

No Go to the next section – Physical Skills

Yes Complete the table below

Form of sign language	Used to communicate with	Used for

Physical skills

This measures the physical skills required to do the job, including finger dexterity, hand-eye co-ordination of limbs and sensory co-ordination.

1.	Tick 1 box to indicate the keyboard skills needed for your job:		
Required		Used for.	
Not required, or 2-finger operation with no time constraints	<input type="checkbox"/>		
Precision required, keyboard used for some aspects of work	<input type="checkbox"/>		
Precision and speed, keyboard skills integral to main duties	<input checked="" type="checkbox"/>	Required for regular data input onto databases. Requirement for accuracy.	
Considerable precision and speed, keyboard skills e.g. for data input	<input type="checkbox"/>		
2.	Tick 1 box to indicate whether driving skills are needed for your job, and state the nature and complexity of the vehicle driven.		
Required		Nature of Vehicle	Purpose of driving
Not required (other than for driving to and from work)	<input checked="" type="checkbox"/>		
Normal driving skills e.g. for travel between work locations	<input type="checkbox"/>		
Other driving skills e.g. for specialist vehicles/plant	<input type="checkbox"/>		
3.	Are there any other forms of physical skill (dexterity, co-ordination or sensory skills) required for your job (e.g. for operating equipment, machinery or tools for preparing food)?		
No	<input checked="" type="checkbox"/>	Go to the next section – Initiative and Independence	
Yes	<input type="checkbox"/>	Complete the table below	
Skill	Used for		Precision / Speed
E.g. Dexterity	Peeling, chopping vegetables		Economical use, portion control, restricted time

Initiative and Independence

This factor looks at how independent you have to be within your job. This takes into account the nature and level of supervision of the jobholder, the level and degree of direction and guidance provided by policies, precedents, procedures and regulations, and whether the jobholder works on their own or with others.

1.	How do you know what you should be doing each day? Explain briefly below:	
	Post holder generally set own agenda for the day. For example, post holder works to particular financial processes which are calendared by the Finance Director with set deadlines, however post holder decides prioritisation of workload. Postholder is responsible for the day-to-day management of the operational/support services across the academy, as delegated by the Principal, and therefore has autonomy to decide on agenda for the day (in line with established and agreed deadlines).	
2.	What instructions, procedures, policies, legislation, govern you work? Explain briefly below:	
	Post holder works by the BWT Finance Handbook, set by the Finance Director, and Trust policies and procedures.	
3.	Give 2 examples of problems or decision you would deal with yourself, without reference to a supervisor or manager.	
	Example 1	
	Postholder addresses performance issues of a member of support staff in line with BWT policies.	
	Example 2	
	If an internal audit flagged up a particular issue, post holder would take necessary actions to rectify the problem in readiness for the next audit.	
4.	Give 2 examples of problems or decisions you would refer to your supervisor or manager:	
	Example 1	
	If a project that the postholder was managing was not going to meet proposed timescales or within agreed budget, postholder would refer to the Principal to resolve.	
	Example 2	
	Post holder may make recommendations to staffing model, following identification from the Principal of a need for additional staff, with costs included. An approval to recruit form will be completed and sent to the Principal, Executive Principal and CEO for approval.	
5.	What form(s) of direction, management or supervision do you receive, from whom and how often?	
	Form of direction etc.	From whom (job title)
		How often (times per week)
	E.g. Regular team meetings	Supervisor – Senior Social Worker
		Every 2 weeks

Finance team meeting	Principal Director of Education Senior Finance/HR Manager	Fortnightly
Admin/Finance meeting	Post holder Finance and admin team	Weekly
Business Managers meeting	Finance Director Senior Finance/HR Manager All Business Managers	Fortnightly
Line management	Principal	Access to Principal on a daily basis.

Physical Demands

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

1.	Does your job require you to sit in a fixed or constrained position (e.g. sitting at a computer keyboard or in a vehicle driving seat, standing at a drawing board)?			
No	<input checked="" type="checkbox"/>	Go to the next question		
Yes	<input type="checkbox"/>	For what purposes?		
		How long do you have to maintain this position at any one time?	Sitting at keyboard for majority of the time but not constrained.	
		And how often?		times per
2.	Does your job involve any other physical demands?			
No	<input checked="" type="checkbox"/>	Go to the next section – Mental Demands		
Yes	<input type="checkbox"/>	Go to the next question		
3.	Does your job require periods of standing and walking beyond normal movement between indoor working area?			
No	<input checked="" type="checkbox"/>	Go to the next question		
Yes	<input type="checkbox"/>	For what purposes?		
		How long are these periods of standing and walking?		
		And how often do they occur?		times per
4.	Does your job require lifting and/or carrying of items or equipment (beyond light office materials, such as pens, pencils and limited quantities of paper)?			
No	<input checked="" type="checkbox"/>	Go to the next question		
Yes	<input type="checkbox"/>	Complete the table below:		
What and why	How heavy	How far	For how long	How often % working time
E.g. bucket of water, for floor washing	5 kg?	50m (up flight of stairs)	5 mins	1 per day – 2%
5.	Does your job require pushing and/or pulling of items or equipment?			

No	<input checked="" type="checkbox"/>	Go to the next question			
Yes	<input type="checkbox"/>	Complete the table below:			
What and why		How heavy	How far	For how long	How often % working time
6.	Does your job require rubbing, scrubbing, digging or similar form of physical effort?				
No	<input checked="" type="checkbox"/>	Go to the next question			
Yes	<input type="checkbox"/>	Which of these, and for what purposes?			
		How long at any one time do you rub and/or scrub, dig or similar?			
		And how often?			
7.	Does your job require working in an awkward position (e.g. crouching, kneeling)?				
No	<input checked="" type="checkbox"/>	Go to the next question			
Yes	<input type="checkbox"/>	Complete the table below:			
Position		Why	For how long	How often % working time	
E.g. Kneeling		To scrub kitchen floor	20-30 mins	1 per day – 10%	
8.	Does your job involve any other form of physical demand?				
Physical demand		Why	For how long	How often % working time	

Mental Demands

This looks at the degree and frequency of your concentration, alertness and attention to detail required by your job.

1.	Does your job require more than general awareness and sensory (i.e. using eyes, ears, touch or smell) attention, (e.g. more than general attention for watching children at play, word processing text or inputting data)?		
No	<input type="checkbox"/>	Go to the next question	
Yes	<input checked="" type="checkbox"/>	Complete the table below:	
Form of sensory attention	Needed for	For how long	How often % working time
E.g. Visual & listening attention	Watching children at play	Average 2 hours	Once a week – 5%
Visual and listening attention	Answering phone enquiries, visitors in reception	1 ½ hours at any one time	Daily
2.	Does your job require more than general mental attention or concentration (e.g. more than general mental attention for repeated manual calculations, drafting a complex report)?		
No	<input type="checkbox"/>	Go to the next question	
Yes	<input checked="" type="checkbox"/>	Complete the table below:	
Form of mental concentration	Needed for	For how long	How often % working time
E.g. Totalling and tallying receipts	Balancing cash office accounts	30 mins (if tallies) to 1 hour	Twice per day – 20%
Mental concentration	Payroll checks – ensuring mileage/expenses/absences are included	Up to an hour	Monthly
Mental concentration	Month-end checks and processes	Up to 3 hours at any one time. 2 days in total to complete	Monthly
Mental concentration	Producing reports from PS financials to analyse budget	3-4 hours at any one time	Monthly
Mental concentration	Payments for parents – dinners, trips, uniforms, visits	1 hour at any one time	Daily

Mental concentration	Processing financial transactions, checking and approving orders and invoices	1-2 hours	Daily
3.	Is your job subject to work-related pressures e.g. regular deadlines, frequent interruptions, conflicting demands?		
No <input type="checkbox"/>	Go to the next question		
Yes <input checked="" type="checkbox"/>	Compete the table below:		
Form of work related pressure	Source	For how long	How often % working time
E.g. Telephone interruptions (e.g. to clerical tasks)	Suppliers, other staff	2-20 mins per call	10-20 times per day
Telephone interruptions	Parents, suppliers, other schools	2-20 mins per call	Approx. 20 times per day
Interruptions by visitors in reception	Parents, staff	2-20 mins per interruption	Approx. 10 times per day
Regular deadlines – monthly deadlines for finance, payroll	Principal, Cluster Business Manager, Finance Director	5 days	Monthly
Deadlines – workforce census, student census	External	3 days	Annually
Conflicting demands	Principal, Cluster Business Manager, Finance Director	1 day	Weekly
4.	Does your job involve any other form of mental demand?		
No <input checked="" type="checkbox"/>	Go to the next section – Emotional Demands		
Yes <input type="checkbox"/>	Compete the table below:		
Mental Demand	Source	For how long	How often % working time

Emotional Demands

Emotional demands are those arising from contacts or work with other people. For instance, those who are angry, difficult, upset or unwell; or in circumstances such as to cause stress to the jobholder.

1. Does your job involve contact (in person or by telephone) with people who by their circumstances or behaviour (for example homelessness, mentally ill, terminally ill) cause you emotional stress or upset? People can include the public, service users (including pupils) or other employees of the organisation, but not your immediate work colleagues.

Yes

Please give examples.

No

2. These people – who are they?

Cause of emotional stress or upset

Frequency of stress (daily/monthly/etc.)

Safeguarding disclosures or other disclosures (including staff, parents, students)

As a senior member of support staff, postholder may be exposed as first port of call

Monthly

3. Does your job involve any other form of emotional demand?

No

Go to the next section – Responsibility for People

Yes

Complete the table below:

Emotional Demand	Why	For how long	How often

Responsibility for People – Wellbeing

This factor measures any job responsibilities which have a DIRECT (hands on) impact on the well-being of individual, or groups of, people.

1.	Do you undertake any tasks or duties which have a direct impact on people?		
No	<input checked="" type="checkbox"/>	Go to the next section – Responsibility for Supervision/Direction/Co-ordination of Employees	
Yes	<input type="checkbox"/>	Complete the table below:	
Task / Duty		Who benefits	How people benefit
E.g. Preparing and serving meals		Pupils and staff	Regular nutritious meals maintaining health of pupils and staff
Provision of support services to the academy		Staff and students	Compliance with H&S regulations, HR regulations etc.
2.	Are any people reliant, i.e. personally dependent, on you for their care and welfare?		
No	<input checked="" type="checkbox"/>	Go to the next question	Yes <input type="checkbox"/> Complete the table below:
Reliant people (who benefit)		Needs of reliant people (how people benefit)	What done for reliant people (task/duty)
E.g. SEN students		Physical and social support	Food preparation, bathing, and talking to students including assessing their needs and state of health.
3.	Do you implement, or enforce (i.e. have formal responsibility for initiating prosecution against failures to comply) any Statutory Regulations which have a direct impact on the health, safety or wellbeing of people?		
No	<input checked="" type="checkbox"/>	Go to the next question	Yes <input type="checkbox"/> Complete the table below:
(A) Implement		Who direct impact on	Nature of impact

E.g. Implement food regulations	People eating in public places	Ensuring health of people through maintenance of food hygiene standards
(B) Enforce	Who direct impact on	Nature of impact
4.	Do you have other responsibilities, not listed above, which impact on the wellbeing of people? For example development of policies or providing advice, guidance or interpretation of procedures or regulations which impact on the wellbeing of people. (Only include within this answer any responsibility that has as its main focus the wellbeing of people.)	
Responsibility	Nature of Impact	Who impact on
5.	Do you have any other responsibilities for people, including health and safety?	
Other responsibilities	Who benefits	How benefit

Responsibility for Supervision/Direction/Coordination of Employees

This factor measures the DIRECT (hands on) responsibility of the job holder for the supervision, co-ordination or management of employees, or others in an equivalent position.

1. Does your job involve demonstrating your own duties, giving advice and guidance or training other employees?			
No <input type="checkbox"/>	Go to the next question		Yes <input checked="" type="checkbox"/> Complete the table below:
Whom (Job Groups)		What (i.e. demonstrating, guiding, training)	How often
Finance Assistants Admin Assistants/Receptionists Other operational support staff		Demonstrating, guiding, training	Responsible for induction of staff and support as and when required
2. Does your job directly involve the supervision, co-ordination or management of employees or others in an equivalent position?			
No <input type="checkbox"/>	Go to the next section – Responsibility for Financial Resources		
Yes <input checked="" type="checkbox"/>	List below the employees/supervised/co-ordinated/managed, their job group and types of work and enter appropriate responsibility and location codes.		
Responsibility Codes:	1 = Regular instructions 2 = Regular checking work 3 = Regular allocation of work 4 = Organisation of work 5 = Evaluation and appraisal of work	6 = Evaluation of working methods 7 = Employee development 8 = Recruitment 9 = Discipline 10 = Co-ordination and management (the work of staff may be co-ordinated or managed through others' direct supervision)	
Location Codes:	S = Same workplace as self Number = number of other workplaces e.g. 1 = 1x other, 10 = 10x others.		
Employees supervised etc., No's, Job Groups	Type of work	Type of Responsibility Code	Location Code
E.g. 4 Finance Assistants 1 Secretary/Clerical	Order processing Typing and WP operating	1,2,3,4,5,6,8,9 2,5	S S
Finance Assistants	Processing orders, assisting with processing payments	1,2,3,4,5,6,7,8,9,10	S
Admin Assistants/Receptionists	General admin duties, answering phone calls, dealing	1,2,3,4,5,6,7,8,9,10	S
Other operational support staff	with reception, WP, HR, PA Work	1,2,3,4,5,6,7,8,9,10	S

	Support function across a school		
3.	Do you have other responsibilities not listed above, which impact on staff even though there is no direct managerial or supervisory relationship?		
Responsibility	Nature of Impact	Employees affected – give numbers and job group where relevant	
E.g. Giving legal advice on employee discipline and employment tribunal cases	Effects individual managers and overall management	Staff and managers throughout Trust	
HR advice to staff in line with BWT policies and procedures	Supports management of staff for the Principal	Staff (teaching and support) within the Academy	

Responsibility for Financial Resources

This factor measures the DIRECT (hands on) responsibility of the jobholder for financial resources, including budgets, accounting for expenditure or the administration of invoices etc.

1. Are you directly responsible for financial resources?			
No <input type="checkbox"/>	Go to the next question	Yes <input checked="" type="checkbox"/>	Complete the table below:
Financial responsibility	Value	Nature of impact	How often
Handling cash	Up to £15000	Monitoring of cash for trips, visits, meals	Monthly
Security of cash and other financial resource	Up to £15000	Secure storage of cash	Monthly
Handling of cheques, invoices, other financial transaction documents	Variable	Accurate and up to date payment of invoices in a secure manner	Monthly
Accounting for receipts or expenditures	Up to £7M	Accurate management of income and expenditure	Continuously
Authorising expenditures	N/A	Principal authorises expenditure	N/A
Budget setting	Up to £7M	Set by Finance Director and Cluster Business Manager. Post holder makes adjustments	Annually
Budget monitoring	Up to £7M	Academy budget (including staffing) – monitored to ensure effective management of allocation.	Daily
Long term financial planning	N/A	N/A	N/A
Income collection or generation	N/A	N/A	N/A
Other, please specify			
2. Do you have any other responsibilities that focus on the academy's financial policies or well-being? For example, for developing financial policies and procedures or for providing advice, guidance or interpretation of policies or procedures. (Only include within this answer a responsibility which has as its main focus the academy's financial policies or wellbeing)			
No <input type="checkbox"/>	Go to the next section – Responsibility for Physical Resources	Yes <input checked="" type="checkbox"/>	Please specify below:
Responsibility	Nature of Impact		
Provision of advice and guidance to members of staff (including the Principal) based on financial and HR policies and procedures which are in place.	Appropriate management of budget and staffing of the Academy to ensure its effective operation and compliance.		

Responsibility for Physical and Information Resources

This factor measures the DIRECT (hands on) responsibility of the jobholder for physical resources, including information systems, equipment or tools, buildings, supplies or stocks, and personal possessions of others.

1.	Are you responsible for any manual or computer information?		
No	<input type="checkbox"/>	Go to the next question	
Yes	<input checked="" type="checkbox"/>	Complete the table below	
Information for which responsible	Nature of responsibility		How often
E.g. Computerised personnel (50 fields) and sickness absence records for 1000 employees	Input accurately data on computer, undertake pre-set analyses, maintain confidentiality and security		Daily
Access to student records (MIS) Financial data – PS financials, paper records HR records	Maintain confidentiality and security		Daily
	Responsible for maintain accuracy and security		Daily
	Responsible for maintain accuracy and security		Daily
2.	Do you adapt, design or develop any information systems?		
No	<input checked="" type="checkbox"/>	Go to the next question	
Yes	<input type="checkbox"/>	Complete the table below:	
Information system (type & size)	How adapt/design		How often
E.g. Departmental accounts system with 500 cost centres and 100 cost codes	Draw up specification for information to be held and analysis requirements for programmer to execute		Once a year
3.	Do you use any office or other equipment, tools or instruments, or vehicles, plant and machinery?		
No	<input checked="" type="checkbox"/>	Go to the next question	
Yes	<input type="checkbox"/>	Complete the table below:	
Equipment etc. used	Nature of use and responsibility		How often
E.g. Mower, rotovator and hedgecutter (£1500) Garden tools and wheelbarrow (£500)	Use and general cleaning and greasing as necessary Use and general cleaning		Daily
4.	Are you responsible for the cleaning, maintenance or repair of buildings, external creations or equivalent?		
No	<input checked="" type="checkbox"/>	Go to the next question	Yes <input type="checkbox"/>
			Complete the table below:

Building / Location	Nature of responsibility		How often
E.g. School site	Inspection of cleaning		Daily
5.	Are you responsible for the adaptation, development or design of land, buildings, other construction works or equivalent?		
No <input checked="" type="checkbox"/>	Go to the next question		Yes <input type="checkbox"/>
			Complete the table below:
Land / Building etc.	Nature of responsibility		How often
E.g. Gardens – 1 acre	Landscaping of borders		Twice per year
6.	Are you responsible for the security of any buildings, external locations or equivalent?		
No <input checked="" type="checkbox"/>	Go to the next question		Yes <input type="checkbox"/>
			Complete the table below:
Building / External Location	Nature of responsibility		How often
E.g. 15 multipurpose inside and outside sports centres (£15m)	Draw up, and ensure compliance with security policy for the centres, their contents and users		Daily on an ongoing basis
7.	Do you order or control the stock of any equipment or supplies?		
No <input type="checkbox"/>	Go to the next question		Yes <input checked="" type="checkbox"/>
			Complete the table below:
Equipment/supplies ordered or controlled	Value		How often
E.g. Ordering and stock control or departmental stationery from central supplies	£15000 pa		Monthly order
Ordering stationary or other resources on behalf of other staff.	Up to £1000k (authorised by Principal)		Monthly order
8.	Are you responsible for any personal possessions of others?		
No <input checked="" type="checkbox"/>	Go to the next question		Yes <input type="checkbox"/>
			Complete the table below:
Personal possessions	Nature of responsibility		How often

9.	Are you responsible for the planning of purchasing and the development of physical resources?			
No <input checked="" type="checkbox"/>	Go to the next question		Yes <input type="checkbox"/>	Complete the table below:
Physical resources		Planning responsibility		How often
E.g. Food for schools		Securing most economical purchase of food to appropriate quality standards in accordance with procurement procedures		Continuously
10.	Do you have any other form of responsibility for physical resources, for example, developing policies or procedures in relation to physical resources, or providing advice, guidance or interpretation of policies and procedures?			
No <input type="checkbox"/>	Go to the next section – Working Conditions		Yes <input checked="" type="checkbox"/>	Complete the table below:
What		Nature of responsibility		How often
Provision of advice and guidance around policies		Ensuring established policies and procedures are complied with		As and when required

Working Conditions

This factor measures any exposure to unpleasant working conditions, for example dirt, dust, heat and cold.

1. What kind of places do you normally work in? (e.g. office, clients' homes, public library, council parks and gardens, vehicle). Give approximate % of time.

Places of work	% of Time
Office environment	100%

2. If you work outside, are you required to do so in all weather conditions?

Yes <input type="checkbox"/>	Go to the next question		
No <input checked="" type="checkbox"/>	When are you not required to work outdoors?		

3. Do you experience any unpleasant environmental working conditions? (e.g. dust, dirt, temperature extremes and variations, humidity, noise, vibration, fumes, smells, steam, smoke, grease, oil, confined spaces, cramped conditions)?

No <input checked="" type="checkbox"/>	Go to the next question		Yes <input type="checkbox"/>	Compete the table below:
Environmental working condition	Nature	How long at any one time	How often - % working time	
E.g. Noise	Children shouting in a playground	½ hour	Approx 15%	

4. Do you experience any verbal abuse, aggression or other anti-social behaviour from people (other than your immediate work colleagues)?

No <input type="checkbox"/>	Go to the next question		Yes <input checked="" type="checkbox"/>	Compete the table below:
Nature and source of abuse/aggression	How long at any one time	How often - % working time		
E.g. Swearing from angry parents or members of the public		5 per day – less than 5%		
Swearing or verbal abuse from parents in reception	2-20 minutes	Termly – less than 5%		

5. Do you encounter any hazards in your job?

No <input type="checkbox"/>	Go to the next question		Yes <input checked="" type="checkbox"/>	Compete the table below:
Hazard	How long at any one time	How often - % working time		
E.g. Being cut when cleaning lawn mower blades	10 minutes	Once a day – 1-2%		
Swearing or verbal abuse from parents in reception	2-20 minutes	Termly – less than 5%		

6.	Do you encounter any other disagreeable or unpleasant working conditions in your job?		
No <input checked="" type="checkbox"/>	Go to the next question	Yes <input type="checkbox"/>	Complete the table below:
What and Nature		How long at any one time	How often - % working time
7.	Do you wear any form of protective clothing to carry out your job?		
No <input checked="" type="checkbox"/>	Questionnaire Complete	Yes <input type="checkbox"/>	Complete the table below:
What	Why	How long at any one time	How often - % working time

Authorisation			
I consider that this questionnaire is a fair and accurate statement of the requirements of the job.			
Employee Sign* & Print Name		Date*	
Line Manager Sign* & Print Name		Date*	