

Brooke Weston Trust

Job Evaluation Questionnaire

Job title

Finance Officer - Trust

General Questions

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

To undertake a range of finance support responsibilities to ensure the efficient and effective use of the Trust's budget.

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

| | % of time |
|--|------------------|
| 1. Monitor monthly budgets for the Trust and prepare/analyse reports for the Trust Finance Director and Senior Finance & HR Manager, making recommendations on strategy/management of budgets as appropriate. Including the School Improvement fund and any other Trust cost centre budgets. | |
| 2. Assist with the preparation of the draft annual budget and financial plans, including modelling of income and staffing over the medium term. | |
| 3. Undertake both balance sheet and income and expenditure account monthly reconciliations, for example bank accounts. | |
| 4. Monitor receipt of grant income and query where necessary. | |
| 5. Maintain the Trust intercompany accounts. | |
| 6. Prepare, check and submit the VAT return for the Trust. | |
| 7. Assist with the implementation, development and maintenance of the Trust's financial policies, procedures and systems, ensuring adherence to procurement procedures, financial regulations and audit requirements. Advising on legislation where required. | |
| 8. Maintain the Trust's accounting system, ensuring data is accurate, reliable, and stored confidentially, referring any issues to either the Senior Finance & HR Manager or the Trust Finance Director | |
| 9. Undertake day-to-day supervision of finance staff. | |

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

| | Main tasks/duties/responsibilities | % of time |
|---|------------------------------------|-----------|
| 1 | Financial Modelling | 25% |
| 2 | Financial Accounting | 25% |
| 3 | Management Accounting | 25% |
| 4 | Internal audit/Compliance | 25% |

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 | VAT Return | 1 day per quarter |

| 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 | 5 A*-C including English & Maths – Financial modelling, management accounts. | Prior to application. |
| (2) Procedural (e.g. procedures instructions for carrying out tasks) | Financial modelling, finance accounting, management accounting, internal audit all require detailed and full knowledge of procedures and the accounting process.. | Previous experience off finance and training of the Trust prescribed procedures. Significant experience of management across a large organisation. |
| (3) Equipment (e.g. machines, tools, instruments) | Use of computer. Use of other basic equipment. | On the job training. |
| (4) Administrative systems | High-level knowledge operating Excel. High-level knowledge operating PSF or other finance system. Some knowledge of word and databases. | On the job training. External training courses if required. |
| (5) Organisational (e.g. own and other sections/departments), including arrangements and policies | Involved in the development of financial policies and procedures. Internal Audit requirements. External Audit requirements. | On the job training Experience at a senior level across a large organisation. |
| (6) Specialist (e.g. finance, IT, social work), including practical, theoretical and conceptual knowledge | Association Accounting Technicians (AAT) or equivalent , month end finance procedure, understanding the information in the finance system. Some knowledge of VAT legislation. | Prior to application. Support will be provided by the Trust to achieve this. Professional qualification Attendance at conferences. External training courses if required. Significant experience in a similar setting at a senior level. |

| | | | |
|-----|------------------------------|--|--|
| (7) | Other languages and cultures | | |
| (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

Financial modelling – best use of the school improvement fund. Development of various models taking into account of wide and varied information with consideration of the wide scale implications on the outcomes to students.

Example 2

Impact of coding on financial information and budgeting. The analysis of coding structures to ensure these are accurately updated to ensure that figures accurately reflect the current position to enable the best possible use of the Trust funds to improve the outcomes to students. Ensure structure is in line with current government legislation.

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

Responsible for recommending pay scales for support staff annually. This will be following complex analysis of the payroll data. The recommendation of this outcome to all support staff across the Trust and the external support staff unions.

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

One times per week

- 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 Go to the next question Yes Give an example in the box below:

Example of decision / recommendation / problem:

Pay scales for support staff

Indicate nature and complexity of information / situation:

Varied payroll data of a complex nature will be used to analyse the cost of various models

How do you interpret or analyse the information / situation?

Post holder will explain the data to the Finance Director to enable this to be presented to the Operations Group in order for a decision to be made on the model to be adopted.

| | | | |
|--|---|------------------------------------|-------------------------------------|
| 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 | | |
| | The work requires creative skills for solving straightforward problems | | |
| 3 | The work requires creative and developmental skills for solving varied problems | | |
| 1 | The work requires creative and developmental skills for solving difficult problems | | |
| 2 | 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 | | | |
| Analysing the outcomes from the quarterly audit. Development of policies and procedures to improve the outcome and ensure compliance. Report these changes to the Finance and Resources Committee and Audit and Risk Committee. Communicate these changes and improvements across the Trust. | | | |
| 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 type="checkbox"/> |
| | | Long term (more than a year) | <input checked="" type="checkbox"/> |
| Please give a typical example below: | | | |
| Budget setting across the Trust looking at information and projecting income and expenditure over a 5 year period. | | | |
| 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 | |
| | | | |

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 of Finance Assistants |
| Team working skills | <input checked="" type="checkbox"/> | Is an active member of the Finance Team working with all members of the team. |
| Motivational/team leading skills – includes own staff | <input checked="" type="checkbox"/> | Motivates Finance Assistants |
| Advising, guiding skills | <input checked="" type="checkbox"/> | Advises Finance Director on various finance models |
| Persuading, influencing skills | <input checked="" type="checkbox"/> | Influencing Finance Director on financial issues |
| Counselling skills | <input type="checkbox"/> | |
| Conciliating skills | <input type="checkbox"/> | |
| Advocacy skills | <input type="checkbox"/> | |
| Negotiating skills | <input type="checkbox"/> | |
| Oral (spoken) communication skills | <input checked="" type="checkbox"/> | Regular meetings with Senior Finance & HR Manager & Finance Director |
| Written communication skills | <input checked="" type="checkbox"/> | Provide reports for Operations Group |
| Oral presentation skills | <input checked="" type="checkbox"/> | Present ideas to Operations Group |
| 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 <input checked="" type="checkbox"/> | Go to the next section – Physical Skills | |
| Yes <input type="checkbox"/> | 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"/> | Regular input of data into finance system and excel spreadsheet. Accuracy is essential. | |
| 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 |
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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: | |
| | Sets own agenda for the day within the finance calendar. Can be redirected by Senior Finance and HR Manager. Responsible for prioritisation of workload. Works as per job description Frequently makes decisions | |
| 2. | What instructions, procedures, policies, legislation, govern you work? Explain briefly below: | |
| | Academies Financial Handbook BWT policies and Procedures UK Accounting Standards | |
| 3. | Give 2 examples of problems or decision you would deal with yourself, without reference to a supervisor or manager. | |
| | Example 1 | |
| | Data to use for modelling. Process to model this. | |
| | Example 2 | |
| | Independently corrects codes for financial data. | |
| 4. | Give 2 examples of problems or decisions you would refer to your supervisor or manager: | |
| | Example 1 | |
| | Approval of proposed models to be adopted. | |
| | Example 2 | |
| | An issue arises that is not covered by the BWT policies & procedures. Concern about misuse or mismanagement of finances. | |
| 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 |
| | Line Management | Senior Finance & HR Manager As and when required. |
| | Finance Update Meeting | Finance Director Senior Finance & HR Manager Other Finance Staff Monthly during term time. |

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? | | |
| | | 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% |
| | | | | |
| | | | | |
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|-----------------|---|---|--------------------------|--------------------------|
| 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 | Inputting complex data into system | 2 Hours | 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% |
| Enhanced mental attention | Accuracy of information | 4 Hours | 20% |
| Concentrated mental attention | Financial Modelling | 4 Hours | 20% |
| Development of reports | Reporting to Finance and resources committee | Up to 4 hours | Fortnightly |
| Enhanced, concentrated mental attention | Bank reconciliation | Up to 7 hours | Monthly |

| | | | |
|---|--|--|--------------------------|
| 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"/> | Complete 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 |
| Regular change to deadlines | Finance Director/Senior Finance & HR Manager | | Weekly |
| Conflicting demands – interruptions from central team and colleagues in the schools | Finance Director/Senior Finance & HR Manager/central team/schools | | Daily |
| Telephone/email interruptions | Suppliers/ Finance Director/Senior Finance & HR Manager/schools | Up to 20 per day | Daily |
| 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"/> | Complete 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.)

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 type="checkbox"/> | Go to the next section – Responsibility for Supervision/Direction/Co-ordination of Employees | |
| Yes | <input checked="" 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 Trust | | Staff & students | Compliance with H & S regulations, HR regulations |
| 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 | Demonstrating, guiding, training | Staff induction, support 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 | Purchase ledger | 1,2,3,4,5,6,7,8,9 | S |

| 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 |
| | | |

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 | | | |
| Security of cash and other financial resource | | | |
| Handling of cheques, invoices, other financial transaction documents | | | |
| Accounting for receipts or expenditures | | | |
| Authorising expenditures | | | |
| Budget setting | Up to £50m | Accounting for very large expenditure across all Trust schools. | Annually |
| Budget monitoring | £3m | Monthly accounts | Monthly |
| Long term financial planning | Up to £50m | Financial Modelling – contributes to long term financial strategy of the Trust | Annually |
| Income collection or generation | | | |
| Other, please specify | | | |
| 2. Do you have any other responsibilities that focus on the authority'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 authority'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 | | |
| Contributes to the development of financial polices and then guidance as to their application | Appropriate management of Trust budget. | | |

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 |
| Financial Data | Accuracy, analysis, confidentiality & security | Daily |
| 2. | Do you adapt, design or develop any information systems? | |
| No | <input type="checkbox"/> | Go to the next question |
| Yes | <input checked="" 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 |
| Spreadsheets | Develop to provide information required for modelling. Development of financial tracking systems for use by others within the schools. Adaptation of the reporting processes within the PSF package. | Six times per year |
| 3. | Do you use any office or other equipment, tools or instruments, or vehicles, plant and machinery? | |
| No | <input type="checkbox"/> | Go to the next question |
| Yes | <input checked="" 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 |
| General Office Equipment | Use | 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"/> |
| Building / Location | | | How often |
| Nature of responsibility | | | Complete the table below: |
| 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"/> |
| Land / Building etc. | | | How often |
| Nature of responsibility | | | Complete the table below: |
| 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 checked="" type="checkbox"/> |
| Building / External Location | | | How often |
| Nature of responsibility | | | Complete the table below: |
| 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 supplied? | | |
| No <input checked="" type="checkbox"/> | Go to the next question | | Yes <input type="checkbox"/> |
| Equipment/supplies ordered or controlled | | Value | How often |
| E.g. Ordering and stock control or departmental stationery from central supplies | | £15000 pa | Monthly order |
| | | | |

| | | | |
|--|--|--|---------------------------|
| 8. | Are you responsible for any personal possessions of others? | | |
| <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 checked="" type="checkbox"/> | Go to the next section – Working Conditions | Yes <input type="checkbox"/> | Complete the table below: |
| What | | Nature of responsibility | How often |
| | | | |

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 | 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 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 checked="" type="checkbox"/> | Go to the next question | | Yes <input 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% | | |
| | | | | |

5. Do you encounter any hazards in your job?

| No <input checked="" type="checkbox"/> | Go to the next question | | Yes <input 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% | | |
| | | | | |

| | | | |
|--|---|------------------------------|----------------------------|
| 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* | |