

PAY AND CONDITIONS REVIEW PROJECT – PHASE 2

ROLE TEMPLATE FOR STREAMLINING PROCESS

Finance Professional – Level 1

(Score: 387, Proposed Grade: E)

- 1) The postholder will undertake the processing of Invoices including the carrying out of both technical and financial checks
- 2) The postholder will assist with both the debt recovery and income processes
- 3) The postholder will handle routine enquiries from both Internal and External Audit
- 4) The postholder will provide day to day advice on routine matters and give advice in the practical use of financial systems
- 5) The postholder will assist with data collection activities in connection with statistical returns
- 6) The postholder will assist at closedown by chasing outstanding commitments and similar activities
- 7) The postholder will have an awareness of Financial Standing Orders and Contract Standing Orders
- 8) The postholder could be involved in specific activities such as Payroll Administration / Queries or Pensions Administration / Queries

The postholder is unlikely to have any supervisory responsibility

The postholder is unlikely to need formal financial qualifications

The postholder is likely to have some experience in a financial environment

Finance Professional – Level 2

(Score: 446, Proposed Grade: G)

- 1) The postholder will undertake the processing of Invoices including the carrying out of both technical and financial checks. The postholder is likely to be involved in follow up work requiring further research / analysis to reach a satisfactory conclusion.
- 2) The postholder will assist with both the debt recovery and income processes
- 3) The postholder will handle routine enquiries from both Internal and External Audit
- 4) The postholder will provide day to day advice and provide budget monitoring support to CCM's and others on routine matters and give advice in the practical use of financial systems
- 5) The postholder will assist with data collection activities in connection with statistical returns
- 6) The postholder will assist at closedown by chasing outstanding commitments and similar activities
- 7) The postholder will have an awareness of Financial Standing Orders and Contract Standing Orders
- 8) The postholder could be involved in specific activities such as Payroll Administration / Queries or Pensions Administration / Queries
- 9) The postholder is likely to deal with significant amounts of Manual or Computerised data e.g. payroll data across County

The postholder is unlikely to have any supervisory responsibility

The postholder is likely to have or be studying for AAT or similar

The postholder is likely to have a minimum of three years finance experience

Finance Professional – Level 3

(Score: 498, Proposed Grade: H)

- 1) The postholder will undertake budget monitoring at an individual CCM level on both expenditure and income.
- 2) The postholder will undertake the delivery of financial reconciliations i.e. the balancing of suspense accounts etc
- 3) The postholder will provide advice to Cost Centre Managers on more advanced issues, and this is likely to involve detailed work to establish and provide that advice
- 4) The postholder will provide support to individual Cost Centre Managers in terms of forecasting
- 5) The postholder will handle more complex enquiries from both internal and external audit and this is likely to include elements of data collection
- 6) The postholder will be involved in the compilation of more complex statistical returns especially where some analysis is required
- 7) The postholder will assist at Closedown by the coordination of key elements e.g Creditors/ Debtors
- 8) The postholder will be able to provide guidance in the practical application of Financial Standing Orders and Contract Standing Orders and be able to give advanced advice on use of financial systems

The postholder is likely to be a Team Leader / Supervisor of a small team, carrying out their appraisals and work planning

The postholder is likely to be qualified to AAT or similar

The postholder will have a minimum of three years finance experience

Finance Professional – Level 4

(Score: 537, Proposed Grade: I)

- 1) The postholder will undertake budget monitoring at an individual CCM level on both expenditure and income.
- 2) The postholder will undertake the delivery of financial reconciliations i.e. the balancing of suspense accounts etc
- 3) The postholder will provide advice to Cost Centre Managers on more advanced issues, and this is likely to involve detailed work to establish and provide that advice. The postholder would be expected to respond to unexpected problems and to be able to apply initiative to solve them without the need for referral to their manager.
- 4) The postholder will provide routine support to individual Cost Centre Managers in terms of forecasting
- 5) The postholder will handle more complex enquiries from both internal and external audit and this is likely to include elements of data collection
- 6) The postholder will be involved in the compilation of more complex statistical returns especially where some analysis is required

- 7) The postholder will assist at Closedown by the coordination of key elements e.g Creditors/ Debtors
- 8) The postholder will be able to provide guidance in the practical application of Financial Standing Orders and Contract Standing Orders and be able to give advanced advice on use of financial systems

The postholder is likely to be a Team Leader / Supervisor of a small/medium sized team, carrying out their appraisals and work planning

The postholder is almost certain to be qualified to AAT or similar

The postholder will have extensive finance experience

Finance Professional – Level 5

(Score: 633, Proposed Grade: L)

- 1) The postholder will be responsible for forecasting and the compilation of directorate budgets including the coordination of budget pressures
- 2) The postholder will provide the technical management of cost centres, monitoring budgets and providing detailed advice and guidance to Cost Centre Managers
- 3) The postholder is likely to (be the person who would) make a formal response to Audit on anything other than routine audit enquiries
- 4) The postholder will be responsible for debt recovery and income collection
- 5) The postholder will be responsible for the provision of information to Senior Managers for the Star Chamber process
- 6) The postholder will coordinate the closedown of accounts at year end for the Financial Services Manager
- 7) The postholder is likely to be the level at which statistical returns are signed off with no further significant checking
- 8) The postholder will be the lead officer for compliance with Financial Standing Orders and Contract Standing Orders
- 9) The postholder will undertake reviews and identify improvements to existing financial procedures and/or systems

The postholder is likely to be a Team Leader of small/medium team or responsible for a specific technical area of work

The postholder will be qualified to AAT or similar

The postholder will have extensive finance experience

Finance Professional – Level 6

(Score: 750, Proposed Grade: P)

- 1) The postholder will be a Manager of a Specialist Unit, reporting directly to a Third or Fourth Tier Officer
- 2) The postholder will produce a Business Plan and be responsible for the delivery of its activities
- 3) The postholder will provide strategic (financial) advice to senior managers and Members
- 4) The postholder will be responsible for final accounts closure for the Directorate
- 5) The postholder will be responsible for financial and statistical returns
- 6) The postholder will prepare reports to Committee and Senior Managers

- 7) The postholder will undertake reviews and identify improvements to existing procedures and /or systems
- 8) The postholder will undertake the monitoring of the specialist area activity at directorate/corporate level

The postholder will be responsible for a large team or collection of small teams

The postholder will be qualified to AAT or similar

The postholder will have extensive finance experience