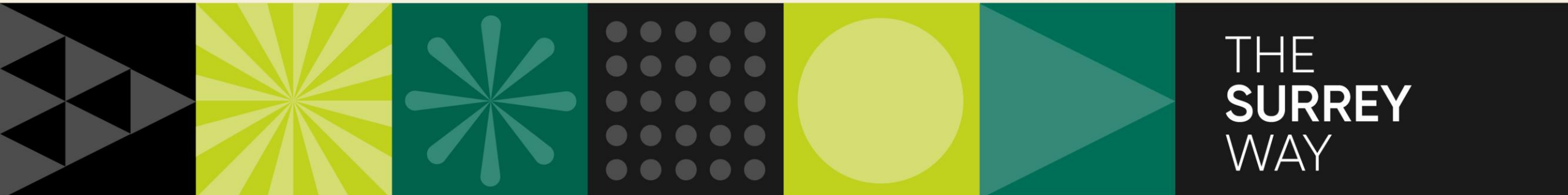


# Finance Service

## Behaviours, Skills and Knowledge framework

A defined set of behaviours, skills and knowledge requirements to provide clarity on expectations required in current and future roles.

To be used as a basis for conversations and aid planning in relation to learning, personal development and career pathways.



<b>Key</b>	
Essential	Essential for role, integrated use
Key requirement	Key requirement / specific for role, used frequently
Preferential	Preferential for role, used infrequently
Developmental	Awareness and broad understanding

	Minimum level of competency				
	Finance Assistant / Senior Finance Assistant	Financial Analyst	Finance Business Partner	Senior Finance Business Partner	Strategic Finance Business Partner (& Deputy)
<b>Collaborating and Building Relationships</b>					
Listens actively and openly and communicates proactively with stakeholders.	Preferential	Preferential	Key requirement	Essential	Essential
Builds trust, enabling a balance of working in partnership and offering constructive challenge.	Developmental	Preferential	Key requirement	Essential	Essential
Works effectively across boundaries to secure the right outcomes, supporting and respecting diverse contributions.	Developmental	Developmental	Preferential	Key requirement	Essential
<b>Influencing and Effective Communication</b>					
Expresses opinions and information clearly, both verbally and in writing. Presents with skill and confidence, responding appropriately and quickly to the needs of an audience.	Developmental	Preferential	Key requirement	Key requirement	Essential
Gains clear agreement and commitment from others through discussion, negotiating and navigating challenge from others.	Developmental	Developmental	Preferential	Key requirement	Essential
Communicates financial insights and options effectively with a non-finance audience.	Developmental	Preferential	Key requirement	Key requirement	Essential
<b>Leading People and Change</b>					
Shares a clear vision and direction, taking responsibility for achieving outcomes. Holds people to account and drives performance.	Developmental	Developmental	Preferential	Key requirement	Essential
Motivates and empowers people to deliver and to continually learn and develop their own talent.	n/a	Developmental	Preferential	Key requirement	Essential
Embraces change and role models adaptability and a positive approach. Regularly seeks and offers feedback.	Developmental	Developmental	Key requirement	Key requirement	Essential

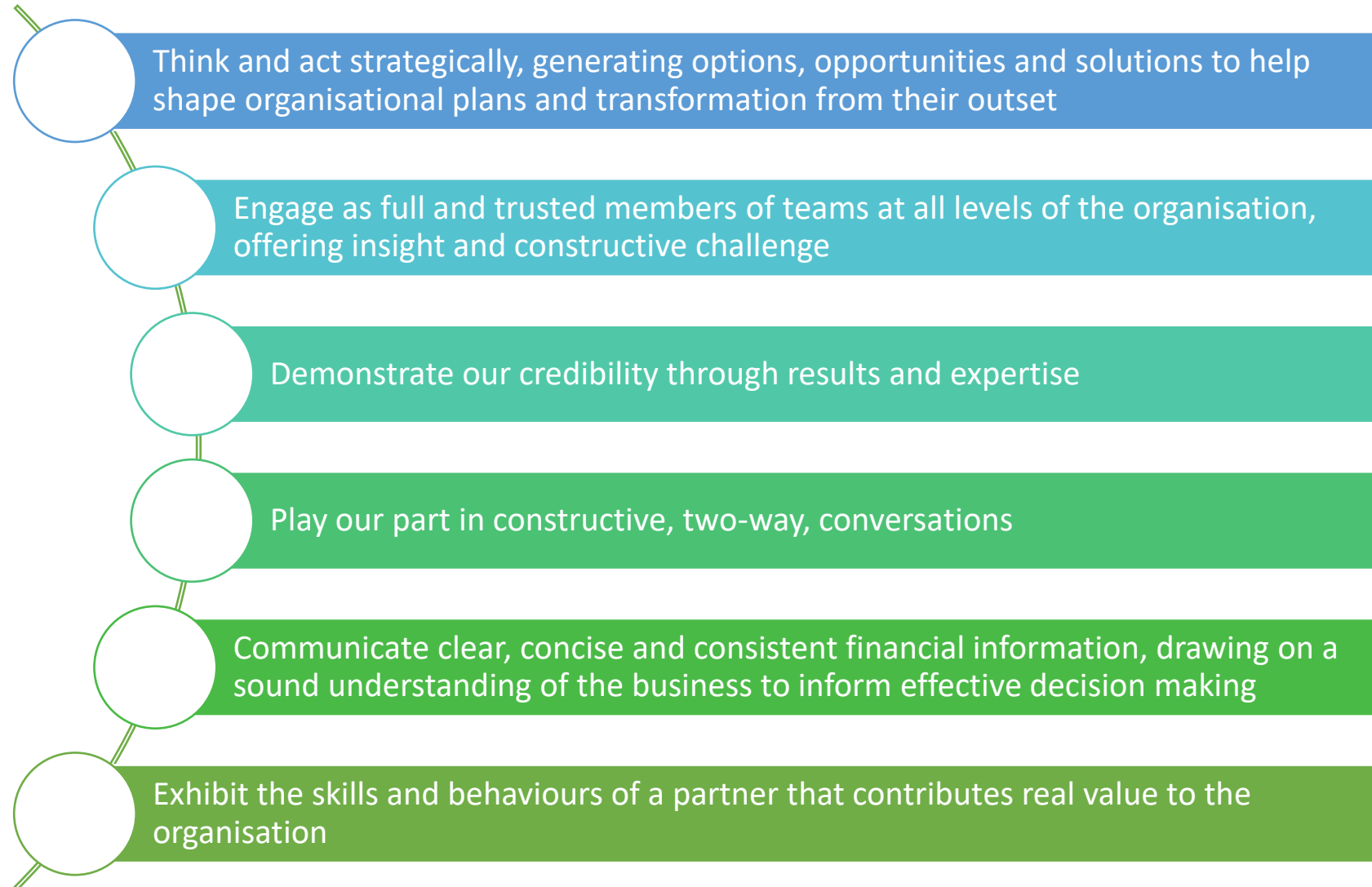
	Minimum level of competency				
	Finance Assistant / Senior Finance Assistant	Financial Analyst	Finance Business Partner	Senior Finance Business Partner	Strategic Finance Business Partner (& Deputy)
<b>Strategic Decision Making</b>					
Thinks and acts strategically and commercially to realise organisational goals. Demonstrates strong business acumen.	Developmental	Developmental	Preferential	Key requirement	Essential
Acts as a partner in decision making, offering financial insight and a pro-active in-depth consideration of risk.	n/a	Developmental	Preferential	Key requirement	Essential
Produces innovative and creative suggestions to generate opportunities for organisational improvement and effectiveness.	Developmental	Developmental	Preferential	Key requirement	Essential
<b>Other Skills, Qualifications and Experience</b>					
<b>Qualifications</b>					
Recognised professional accountancy qualification (CCAB) or equivalent degree-level qualification				Y	Y
AAT qualified or part-qualified CCAB, or equivalent qualification			Y		
Actively studying for AAT or equivalent qualification	Y	Y			
<b>Knowledge</b>					
Knowledge and understanding public sector financial issues and best practice (including commercial financing and funding opportunities and issues at the higher grades)	Developmental	Developmental	Key requirement	Key requirement	Essential
Knowledge and understanding of public sector accounting requirements and the structure of local authority accounts	Developmental	Developmental	Key requirement	Key requirement	Key requirement
Knowledge, understanding and awareness of broader service/role specific issues (or demonstration that these can be grasped quickly)	Developmental	Developmental	Key requirement	Essential	Essential

	Minimum level of competency				
	Finance Assistant / Senior Finance Assistant	Financial Analyst	Finance Business Partner	Senior Finance Business Partner	Strategic Finance Business Partner (& Deputy)
<b>Skills</b>					
Ability to work successfully in a professionally independent and autonomous manner	Developmental	Preferential	Key requirement	Essential	Essential
Ability to perform tasks within a financial management cycle (budgeting, monitoring, closing, etc)	Developmental	Developmental	Key requirement	Essential	Key requirement
Ability to manage own time effectively and to work to deadlines.	Developmental	Key requirement	Key requirement	Key requirement	Key requirement
Ability to analyse and interpret complex financial information	n/a	Developmental	Key requirement	Essential	Essential
Ability to use a wide range of financial and non-financial information in formulating advice and making decisions	n/a	Developmental	Preferential	Key requirement	Essential
Proficiency in use of financial data – manipulation, reconciliation, attention to detail	Developmental	Key requirement	Essential	Key requirement	Key requirement
Knowledge of and proficiency in use of IT within a finance environment	Developmental	Key requirement	Key requirement	Key requirement	Key requirement
Knowledge of, and proficiency in, financial modelling techniques	n/a	Developmental	Key requirement	Essential	Key requirement
<b>Broader Knowledge and Proficiency</b>					
Knowledge of, and proficiency in, project management techniques	n/a	Developmental	Preferential	Key requirement	Key requirement
Knowledge of, and proficiency in, risk management techniques	n/a	Developmental	Preferential	Key requirement	Key requirement
Knowledge of, and proficiency in, process review and improvement techniques	n/a	Developmental	Preferential	Key requirement	Key requirement

# Finance as a Business Partner

Our aim is to be a trusted, proactive and insightful Finance Service operating at the heart of the organisation.

We will....



## Examples by role

	Finance Analyst	Finance Business Partner	Senior Finance Business Partner	Strategic Finance Business Partner (& Deputy)
<b>Collaborating and Building Relationships</b>				
Listens actively and openly and communicates proactively with stakeholders.	<p>Be polite, gain trust, listen and present information in a clear and simple way, avoiding jargon. Read your audience (your own team/other stakeholders). Focus on how you communicate as well as what you are communicating. Find the appropriate method of contact, know how to approach stakeholders. Regularly talking with stakeholders, understanding what they do, and what their goals are.</p>	<p>Collaborate across multi-services as well as externally to solve issues. Taking the initiative in fostering and building on collaborative working relationships. Talk to each other to develop best practice and evolve BAU. Constructively challenge budget holders.</p>	<p>Being proactively involved in service conversations to influence from inception. Get feedback from stakeholders. Have links and a voice externally and nationally. Involvement in decision making cross organisationally. Work as a team and living the 'successful together' strapline.</p>	
Builds trust, enabling a balance of working in partnership and offering constructive challenge.				
Works effectively across boundaries to secure the right outcomes, supporting and respecting diverse contributions.				
<b>Influencing and Effective Communication</b>				
Expresses opinions and information clearly, both verbally and in writing. Presents with skill and confidence, responding appropriately and quickly to the needs of an audience.	<p>Set up templates for budget holders so they are aware of their position. Regularly seek feedback from stakeholders and business partners to ensure what you are presenting is relevant and useful. Open communication to ensure that any uncertainties are raised. Where necessary follow up meetings with an e-mail summary.</p>	<p>Present to non financial stakeholders. Work across different services on projects eg Greener Futures. Influence eg evaluation process of tender. Modelling as to cost implications eg increasing asylum children.</p>	<p>Challenge decisions and raise the profile of finance issues. Present to senior leadership and external stakeholders - provide financial insight through analysis and presentation of relevant data and information in order to inform service strategy.</p>	
Gains clear agreement and commitment from others through discussion, negotiating and navigating challenge from others.				
Communicates financial insights and options effectively with a non-finance audience.				

## Examples by role

	Finance Analyst	Finance Business Partner	Senior Finance Business Partner	Strategic Finance Business Partner (& Deputy)
<b>Leading People and Change</b>				
Shares a clear vision and direction, taking responsibility for achieving outcomes. Holds people to account and drives performance.	Regular budget holder meetings to understand if on track to achieve desired outcomes. Hold budget holders to account for any under/overspends and make sure the reasons are understood and clearly communicated. Knowledge sharing between colleagues. Regularly seek and offer feedback from stakeholders. Proactive attitude to learning and seeking to increase knowledge and skills.	Hold people to account – revisit and challenge. Work with teams to understand why things have changed eg fees and charges. Data analysis backed up with conversations. Motivate staff to meet efficiencies. Gain commitment from others for process improvement. Deliver training.	Positive engagement. Ensure budget holders are more aware of cost containment. Train budget holders on financial accountability. Develop staff/ team via ongoing support, advice and conversations. Set clear objectives. Review lessons learnt and implement improvements for next time e.g. budget setting, RO completion, closing.	
Motivates and empowers people to deliver and to continually learn and develop their own talent.				
Embraces change and role models adaptability and a positive approach. Regularly seeks and offers feedback.				

## Examples by role

	Finance Analyst	Finance Business Partner	Senior Finance Business Partner	Strategic Finance Business Partner (& Deputy)
<b>Strategic Decision Making</b>				
Thinks and acts strategically to realise organisational goals. Demonstrates strong business acumen.	Understand cost behaviour, identify anomalies, and question with stakeholders. Provide accurate and up to date information to enable decision making. Proactively look to improve business practices and financial processes.	Be innovative to resolve issues eg using AI to migrate data from workbooks to new system.	Influence decision making across services through collaboration eg fees and charges template. Understand the delivery of the MTFS to feed into the development of future iterations. Review/ model implications of new tenders and long term contracts.	
Acts as a partner in decision making, offering financial insight and a pro-active in-depth consideration of risk.		Work with the D&Bs to discuss council tax policies and how we can work together to bring benefits to each council as well as SCC. Work with stakeholders to embed.		
Produces innovative and creative suggestions to generate opportunities for organisational improvement and effectiveness.		Provide solutions to problems within services and processes eg shortage of social workers and engineers – train students/candidates in hope of retaining.		