

Finance Behaviours, Skills and Knowledge Framework Matrix

Key

	Level for role	Level for individual
H+	Essential for role, integrated use	Proven, track record, expert, leader
H	Key requirement / specific for role, used frequently	Experienced, in-depth knowledge, demonstrable
M+	Preferential for role, used infrequently	Some experience , broad knowledge of, understanding of the principles
M	Developmental for role	Awareness of, some experience of, broad understanding

Note: Not all behaviours, skills and knowledge need to be demonstrated to the required minimum level at interview or on day one of the job – however most should be demonstrated and L&D plans put in place to bring the remainder up to standard within a defined timescale.

Behaviour, Skill, Knowledge	Minimum level of competency				
	Finance Assistant / Senior Finance Assistant	Financial Analyst	Finance Business Partner	Senior Finance Business Partner	Strategic Finance Business Partner (& Deputy)
Collaborating and Building Relationships					
Listens actively and openly and communicates proactively with stakeholders.	M+	M+	H	H+	H+
Builds trust, enabling a balance of working in partnership and offering constructive challenge.	M	M+	H	H+	H+
Works effectively across boundaries to secure the right outcomes, supporting and respecting diverse contributions.	M	M	M+	H	H+

Behaviour, Skill, Knowledge	Minimum level of competency				
	Finance Assistant / Senior Finance Assistant	Financial Analyst	Finance Business Partner	Senior Finance Business Partner	Strategic Finance Business Partner (& Deputy)
Influencing and Effective Communication					
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.	M	M+	H	H	H+
Gains clear agreement and commitment from others through discussion, negotiating and navigating challenge from others.	M	M	M+	H	H+
Communicates financial insights and options effectively with a non-finance audience.	M	M+	H	H	H+
Leading People and Change					
Shares a clear vision and direction, taking responsibility for achieving outcomes. Holds people to account, and drives performance.	M	M	M+	H	H+
Motivates and empowers people to deliver and to continually learn and develop their own talent.	n/a	M	M+	H	H+
Embraces change and role models adaptability and a positive approach. Regularly seeks and offers feedback.	M	M	H	H	H+

Behaviour, Skill, Knowledge	Minimum level of competency				
	Finance Assistant / Senior Finance Assistant	Financial Analyst	Finance Business Partner	Senior Finance Business Partner	Strategic Finance Business Partner (& Deputy)
Strategic Decision Making					
Thinks and acts strategically to realise organisational goals. Demonstrates strong business acumen.	M	M	M+	H	H+
Acts as a partner in decision making, offering financial insight and a pro-active in-depth consideration of risk.	n/a	M	M+	H	H+
Produces innovative and creative suggestions to generate opportunities for organisational improvement and effectiveness.	M	M	M+	H	H+
Other Skills, Qualifications and Experience					
Qualifications					
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			

Behaviour, Skill, Knowledge	Minimum level of competency				
	Finance Assistant / Senior Finance Assistant	Financial Analyst	Finance Business Partner	Senior Finance Business Partner	Strategic Finance Business Partner (& Deputy)
Knowledge					
Knowledge and understanding public sector financial issues and best practice (including commercial financing and funding opportunities and issues at the higher grades)	M	M	H	H	H+
Knowledge and understanding of public sector accounting requirements and the structure of local authority accounts	M	M	H	H	H
Knowledge of service/role specific issues (or demonstration that these can be grasped quickly)	M	M	H	H+	H+
Skills					
Ability to work successfully in a professionally independent and autonomous manner	M	M+	H	H+	H+
Ability to perform tasks within a financial management cycle (budgeting, monitoring, closing, etc)	M	M	H	H+	H
Ability to manage own time effectively and to work to deadlines	M	H	H	H	H
Ability to analyse and interpret complex financial information	n/a	M	H	H+	H+
Ability to use a wide range of financial and non-financial information in formulating advice and making decisions	n/a	M	M+	H	H+

Behaviour, Skill, Knowledge	Minimum level of competency				
	Finance Assistant / Senior Finance Assistant	Financial Analyst	Finance Business Partner	Senior Finance Business Partner	Strategic Finance Business Partner (& Deputy)
Proficiency in use of financial data – manipulation, reconciliation, attention to detail	M	H	H+	H	H
Knowledge of and proficiency in use of IT within a finance environment	M	H	H	H	H
Knowledge of, and proficiency in, financial modelling techniques	n/a	M	H	H+	H
Broader Knowledge and Proficiency					
Knowledge of, and proficiency in, project management techniques	n/a	M	M+	H	H
Knowledge of, and proficiency in, risk management techniques	n/a	M	M+	H	H
Knowledge of, and proficiency in, process review and improvement techniques	n/a	M	M+	H	H